A PROFILE OF THE SOUTH AFRICAN FORESTRY AND WOOD PRODUCTS MARKET VALUE CHAIN

2012

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1. DESCRIPTION OF THE INDUSTRY

South Africa is lightly forested with 8.9 million hectares (7 percent of the country's area) and 29.3 hectares (24 percent areas of the country), but in arid regions some are found on the banks of rivers or within protected kloofs. These forests are scattered eastwards from the Cape Peninsula through the Outeniqua and Tsitsikama Mountains and the coast of the Eastern Cape, and into KwaZulu-Natal. Northwards, forests are distributed along Drakensburg Mountains and KwaZulu-Natal.

Forestry and wood products provides a range of wood and non-wood products, as well as social and environmental services, such as the conservation of soil, water and biological diversity. Wood and wood products as the main commercial products of forests include fuel wood and charcoal (particularly important in developing countries.

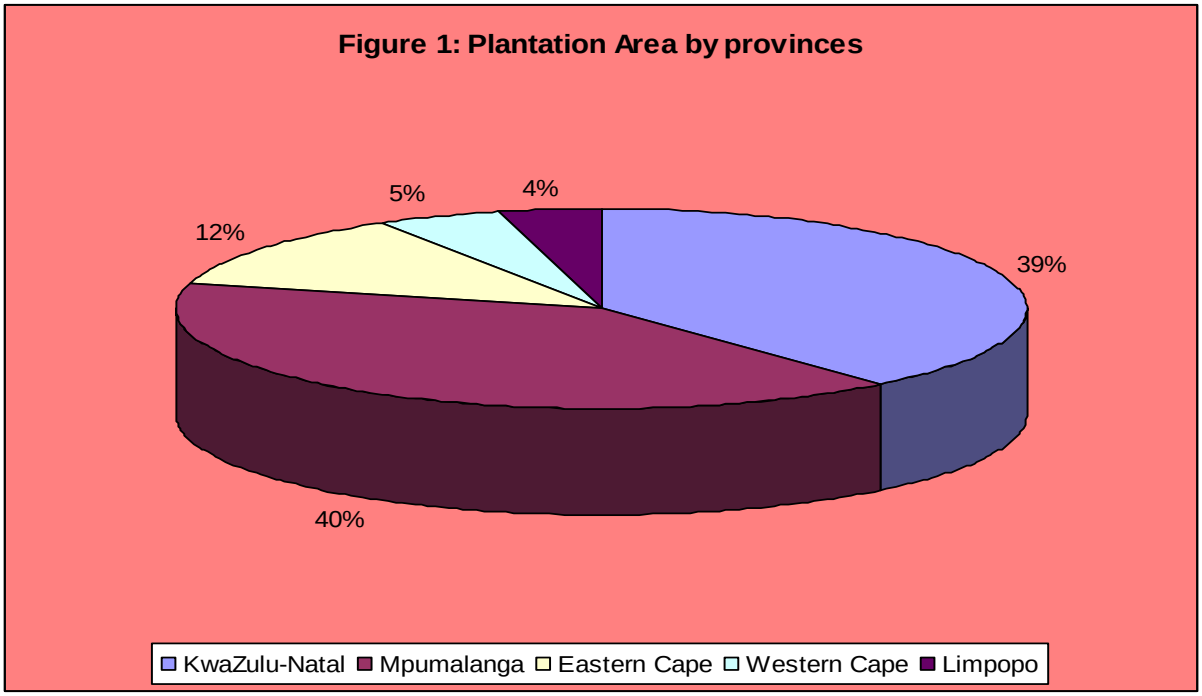
The Southern African Development community (SADC) region in general specializes in raw commodities, which are subject to international commodity prices. Of course these commodities need to be marketed as effectively as possible so that they can benefit SADC countries as foreign exchange earners.

Forestry and wood based products are categorized according to the harmonized system (HS), an international method for classifying products for trade purposes. Categories are as follows: plantation forestry, wood chip, sawmilling, wood charcoal, timber board, mining timber, paper (Newsprint) paper (kraftliner) and poles and treated poles.

1.1. Production trends

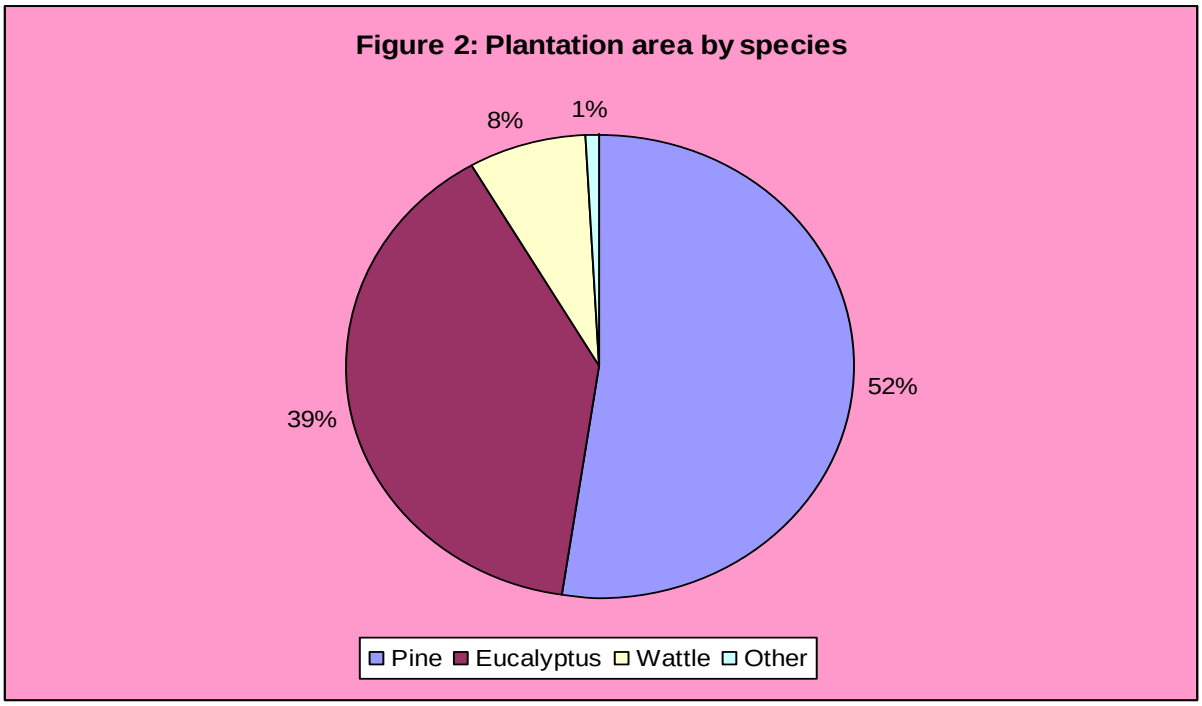
The total commercial timber plantation area in 2007/2008 period was 1 257 341 hectares as compared to 1 266 196 hectares in 2006/2007 period. The private sector ownership timber plantations accounts for 82% as compared to 83% of the total plantation area. Softwood species cover (53%) as compared to 53% of the area and hardwood species cover (47%) as compared to 47% in2007/08. During the 2007/08 year, 10 850 536 tons were sold as pulpwood 4 999 405 tons as saw logs and 416 537 tons as mining timber.

The conversion from one specie to another specie was (8 297 ha) as compared to 8 843 hectares whilst the conversion from forestry to other agricultural uses was (794 ha) as compared to 697 hectares. New afforestation amounted to (2 197 ha) as against 4 641 hectares in 2007/08 period.



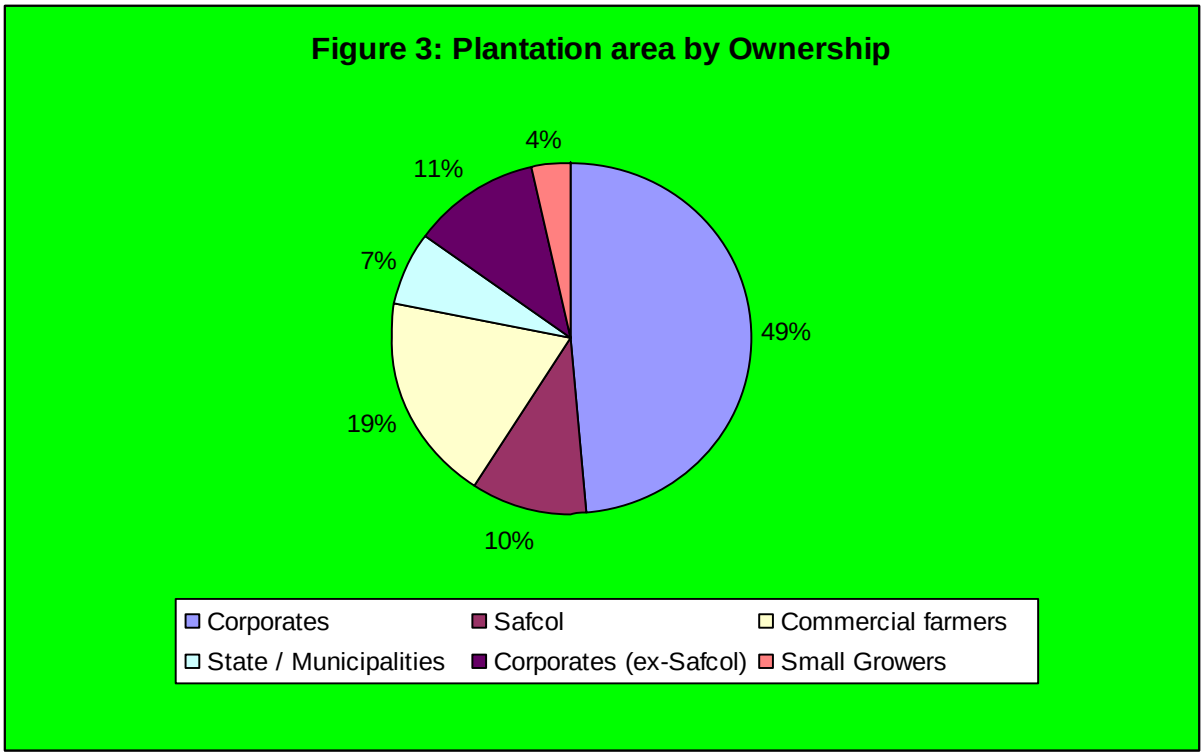
Source: SA Forestry Magazine

Figure 1 depicts provincial plantation areas in South Africa during 2008 period. The graph further depicts that Mpumalanga was the most producing province in terms of forestry production with 40% share followed by KwaZulu-Natal with 39% share.



Source: SA Forestry Magazine

Figure 2 shows plantation areas by species in South Africa during 2008 period. The graph further shows that South Africa planted about 52 percent of pine tree in 2008 followed by 39% of Eucalyptus.



Source: SA Forestry Magazine

Figure 3 indicates plantation areas by ownership in South Africa during 2008 period. The graph further indicates that corporates owned the largest percentage of forestry plantations at 49% followed by commercial farmers at 19%, corporates (ex-Safcol) at 11%, Safcol at 10% and others below 10%.

Table 1: Comparison of different plantations by Provinces between 2007 & 2008 period.

Province	2007		2008	
	Afforested Area		Afforested Area	
	Hectares	%	Hectares	%
Limpopo	48 096	3.8	47 982	3.8
Mpumalanga	514 831	40.7	510 263	40.6
North West	126	0.0	126	0.0
Free State	-	0.0	-	0.0
KwaZulu-Natal	486 967	38.5	486 020	38.7
Eastern Cape	155 079	12.2	153 380	12.2
Western Cape	61 097	4.8	59 570	4.7
TOTAL	1 266 196	100.0	1 257 341	100.0

Source: SA Forestry Magazine

Table 1 shows provinces with plantation areas and hectares during the 2007/ 2008 period. The table further shows that in both 2007 and 2008 years, Mpumalanga Province dominated in terms of the size of afforested areas at about 40.7% and 40.6% respectively. Kwazulu-Natal Province was the second

largest with 38.5% in 2007 and 38.7 in 2008 in terms of the afforested areas. The third biggest was the Eastern Cape Province with 12.2% in 2007 and 12.2% in 2008 in terms of the areas planted.

1.2. Employment status in 2011

The forestry industry is of considerable importance to the national economy and to large numbers of poor people living in remote rural areas. The forest products industry in the country, contributing some 9% to the overall export of manufactured goods and earning net foreign exchange of approximately R8.8 billion in 2003.

- Forestry employment =170 000 people, of which 67 500 is informal employment, 30 000 are contract workers and 39 500 are small growers and their helpers.
- Downstream value adding: between 390 000 and 560 000 people are dependent on plantation forestry for their livelihoods.

2. WORLD CONSUMPTION TRENDS

Although suitable and cost-competitive substitutes for wood, made for example from fossil fuels, are increasingly becoming available, woods major advantage is the fact that it is environmentally friendly. On the other hand, significant forecast felling aids environmental degeneration by contributing to the increase in atmospheric emissions of carbon dioxide.

Between 1980 and 1995, forestlands decreased by almost 200 million hectares in developing countries and increased by only about 20 million hectares in developed countries, resulting in a net loss of 180 million hectares. Developed countries produce and consume almost 80% of the world's industrial wood. Approximately one quarter of all industrial wood enters international trade and about 80% of both exports and imports of forest products come from developed countries.
However, developing countries, notably in Asia and Latin America, are becoming significant where trade in forest products is concerned. Since such trade is expected to increase in future, it will be necessary to offset projected wood deficits, as shown in the table below.

Table2: Forecast of the world timber supply between 2010 -2020

REGION	1996	2010	2020
Oceania (New Zealand & Australia)	42	58	74
South America	130	158	190
North & Central America	600	503	539
Europe and the Baltics	282	330	355
Asia	252	217	288
Africa	67	66	70
Russia	67	130	160
Top supply	1,439	1,461	1,616
Forecast demand		1,801	2,100
Forecast shortfall		340	484

Source: TIPS

Table 2 indicates forecast of the world timber supply by regions between 2010 and 2012 period. The future demand for wood will be driven by global population growth, increasing living standards and wood's cost competitiveness relative to substitute products. Table 2 further indicates projections of wood supply and demand across the globe from 2010 to 2020. The main suppliers will clearly still be the northern hemisphere countries, followed by Asia and South America. Given the forecast demand for wood, SADC has an opportunity to increase its wood supply into world markets over this period. The forecast also gives an indication of countries and regions which might be future potential markets for SADC countries.

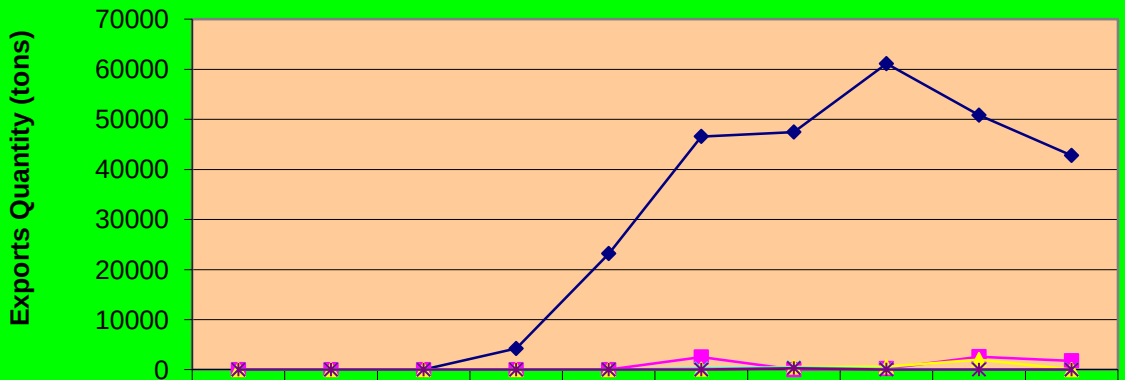
3. MARKET STRUCTURE

Major exports volumes of paper, wood and articles of wood from South Africa to the world mainly landed in Africa and less volumes in Europe, Asia, Americas and Oceania during the period between 2003 and 2012.

3.1. Exports volumes

Figure 4 indicates volumes of newsprint paper (in rolls and sheets) exports from South Africa to various regions of the world between 2003 and 2012.

Figure 4: Exports volumes of newsprint (in rolls & sheets) to various regions



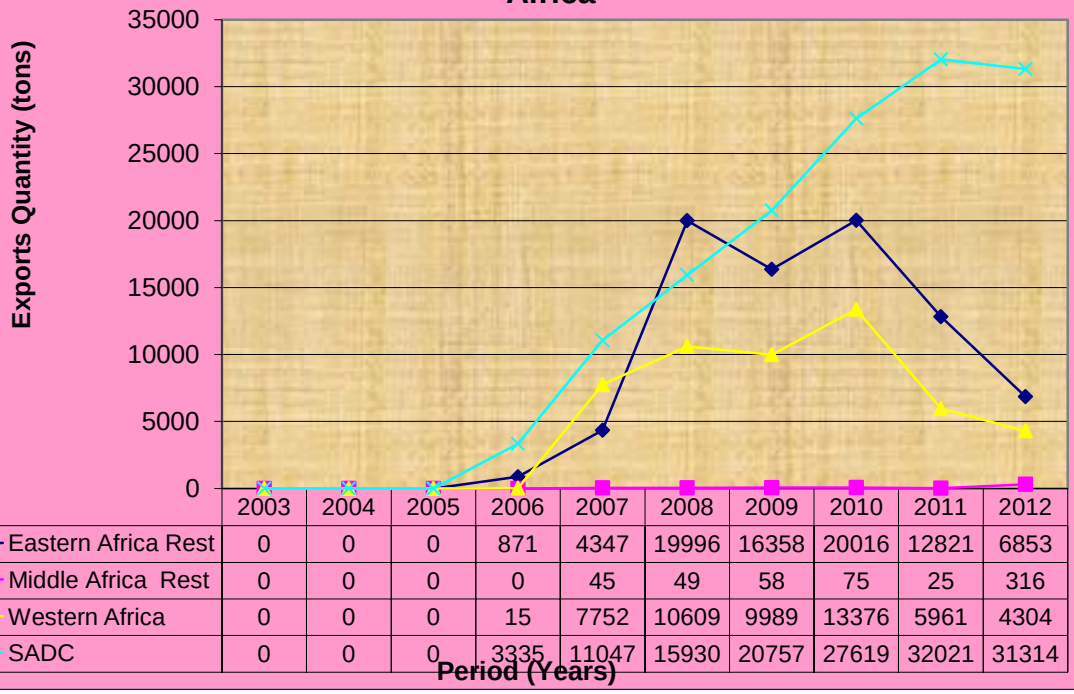
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	0	0	0	4222	23191	46584	47460	61113	50828	42787
Americas	0	0	0	0	0	2535	0	225	2600	1772
Asia	0	0	0	0	0	93	519	575	2028	0
Europe	0	0	0	0	20	200	425	130	34	48
Oceania	0	0	0	0	0	0	316	48	22	0

Source: Quantec

Figure 4 indicates that from 2006, the major export market for newsprint paper, in rolls and sheets from South Africa was Africa, followed by very low or intermittent levels of exports to the Americas. The graph also indicates that between 2003 and 2006, there was no supply of newsprint paper, in rolls and sheets from South Africa to the world except for Africa due to the short supply that was experienced by the country during that period. The graph further indicates that exports volumes of newsprint paper, in rolls and sheets from South Africa to Africa started to increase in 2006 until a peak was attained in 2010 at an export quantity of about 61113 tons. The graph also indicates that in 2011 and 2012, there was a consistent decline in exports volumes of newsprint paper, in rolls and sheets from South Africa to Africa of about 42787 tons.

The decline in exports volumes of newsprint paper (in rolls and sheets) from South Africa to Africa represents 15.8% in 2012 as compared to 2011.

Figure 5: Exports volumes of newsprint (in rolls & sheets) to Africa



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Africa Rest	0	0	0	871	4347	19996	16358	20016	12821	6853
Middle Africa Rest	0	0	0	0	45	49	58	75	25	316
Western Africa	0	0	0	15	7752	10609	9989	13376	5961	4304
SADC	0	0	0	3335	11047	15930	20757	27619	32021	31314

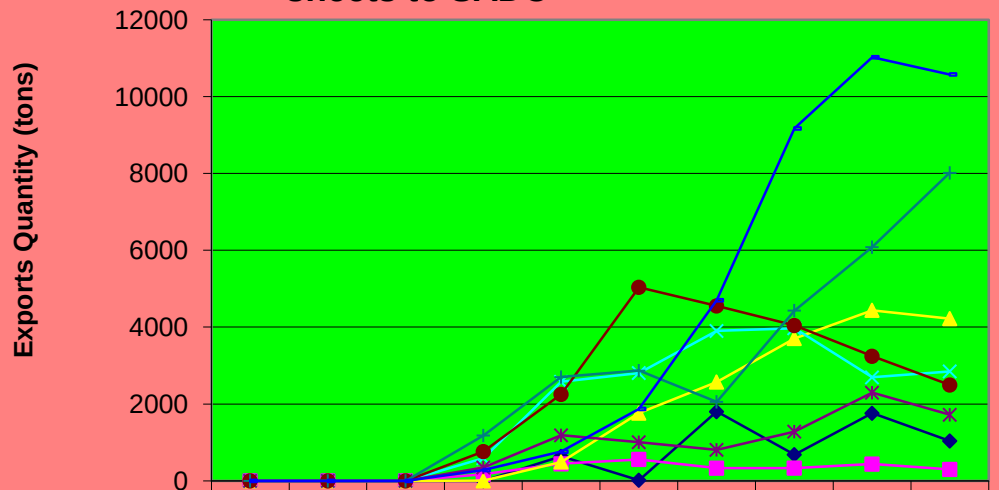
Source: Quantec

Figure 5 shows exports volumes of newsprint paper (in rolls and sheets) from South Africa to Africa between 2003 and 2012 period. The graph further shows that newsprint paper, in rolls and sheets exports from South Africa to Africa went to SADC, followed by Eastern Africa and Western Africa during the period under review. The graph also shows that exports of newsprint paper, in rolls and sheets from South Africa to SADC attained a peak in 2011 at an export quantity of approximately 32 020 tons, while exports of newsprint paper, in rolls and sheets from South Africa to Eastern Africa attained a peak also in 2008 and 2010 respectively at an export quantity of approximately 19 995 and 20 016 tons. The graph further shows that exports of newsprint paper, in rolls and sheets from South Africa to Western Africa attained a peak in 2010 at an export quantity of approximately 13 375 tons. The graph also shows that between 2003 and 2005, there were no exports of newsprint paper, in rolls

and sheets from South Africa due to the short supply that was experienced by the country during that period. The graph further shows that exports volumes of newsprint paper, in rolls and sheets from South Africa to SADC, Eastern and Western Africa experienced a decline in 2012.

The decline in exports volumes of newsprint paper, in rolls and sheets from South Africa to SADC represents 22% in 2012 as compared to 2011.

Figure 6: Exports volumes of newsprint (in rolls & sheets to SADC



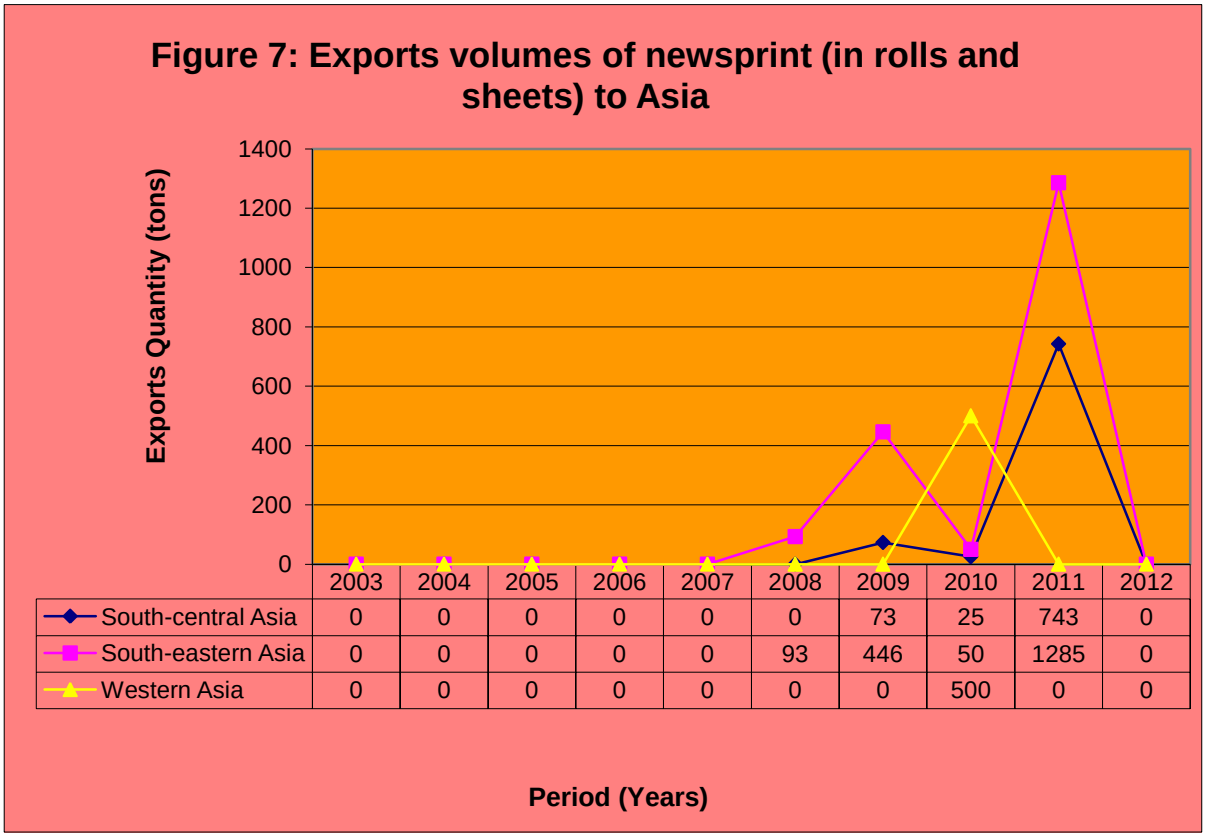
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Angola	0	0	0	0	637	17	1801	682	1759	1038
Democratic Republic of the Congo	0	0	0	169	443	559	331	333	436	298
Mauritius	0	0	0	2	493	1764	2573	3706	4440	4223
Malawi	0	0	0	591	2578	2806	3901	3971	2693	2849
Mozambique	0	0	0	348	1186	1007	808	1282	2294	1720
United Republic of Tanzania	0	0	0	762	2250	5037	4552	4042	3242	2495
Zambia	0	0	0	1181	2700	2868	2057	4431	6082	8014
Zimbabwe	0	0	0	282	760	1872	4701	9171	11024	10577

Period (Years)

Source: Quantec

Figure 6 depicts exports volumes of newsprint paper (in rolls and sheets) from South Africa to the SADC region over the past decade. The graph further depicts that newsprint paper, in rolls and sheets exports from South Africa to SADC went to Zimbabwe, followed by Zambia and United Republic of Tanzania during the period under review. The graph also depicts that exports volumes of newsprint paper, in rolls and sheets from South Africa to Zimbabwe attained a peak in 2011 at an export quantity of approximately 11 024 tons, while those to Zambia attained a peak in 2012 at an export quantity of approximately 8 014 tons. Exports of newsprint paper, in rolls and sheets from South Africa to United Republic of Tanzania attained a peak in 2008 at an export quantity of approximately 5 037 tons. The graph also depicts that between 2002 and 2005, there were no exports of newsprint paper from South Africa to the SADC region due to the short supply that was experienced by the country during that period.

The graph further depicts that exports volumes of newsprint paper from South Africa to Zimbabwe experienced a decline of about 10 576 tons in 2012 and that represents a decline of 4.1% in 2012 as compared to 2011.

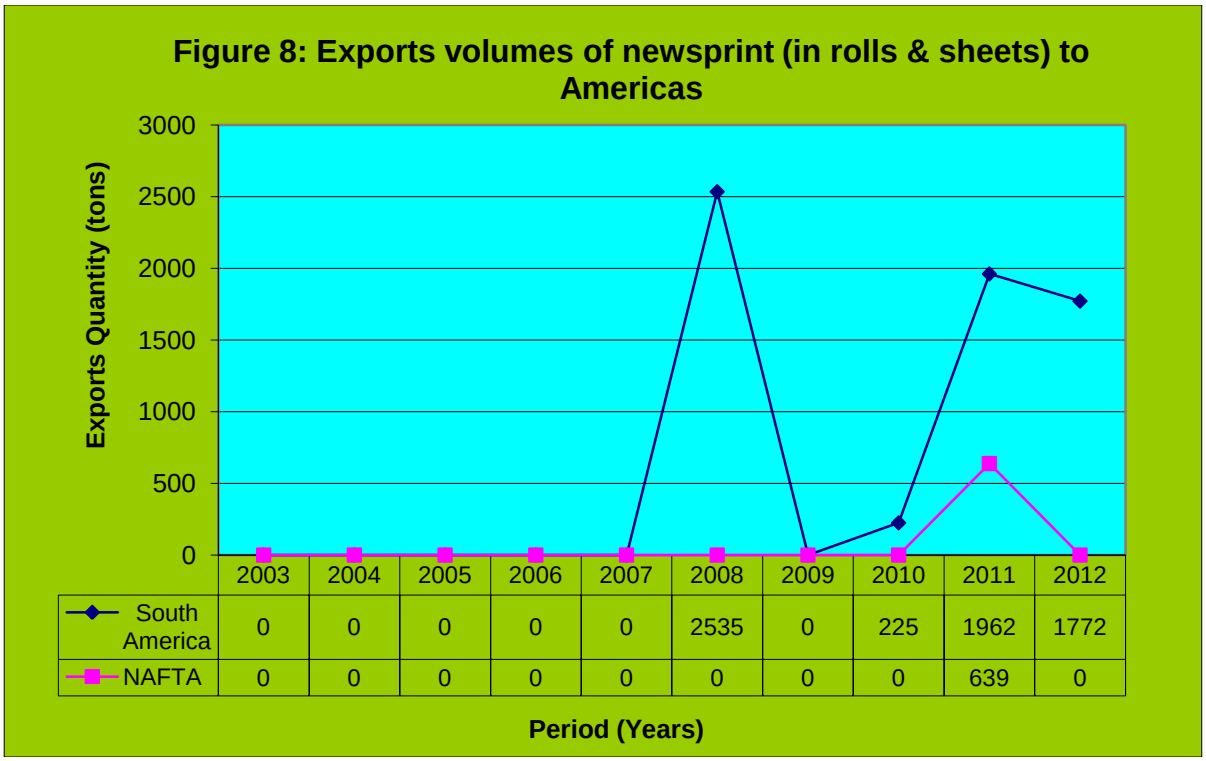


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
South-central Asia	0	0	0	0	0	0	73	25	743	0
South-eastern Asia	0	0	0	0	0	93	446	50	1285	0
Western Asia	0	0	0	0	0	0	0	500	0	0

Source: Quantec

Figure 7 illustrates volumes of newsprint paper (in rolls and sheets) exports from South Africa to Asia between 2003 and 2012 period. The figure further illustrates that during the period under examination, South-eastern Asia commanded the greatest share of newsprint paper, in rolls and sheets exports from South Africa to Asia, followed by South-central Asia and Western Asia. The figure also illustrates that newsprint paper, in rolls and sheets exports from South Africa to South-eastern Asia started to increase in 2008, with a further increase in 2009 until a peak was attained in 2011 at an export volume of approximately 1 285 tons. The figure also illustrates that newsprint paper, in rolls and sheets exports from South Africa to South-central Asia started to increase in 2009, and experienced a decline in 2010 until a peak was attained in 2011 at an export quantity of approximately 742 tons. The figure further illustrates that between 2003 and 2007, and again in 2012, there were no exports of newsprint paper, in rolls and sheets from South Africa to South-eastern, South-central and Western Asia.

The figure also illustrates that there was 100% decline in exports volumes of newsprint paper (in rolls and sheets) from South Africa to South-eastern, South-central and Western Asia in 2012 as compared to 2011.

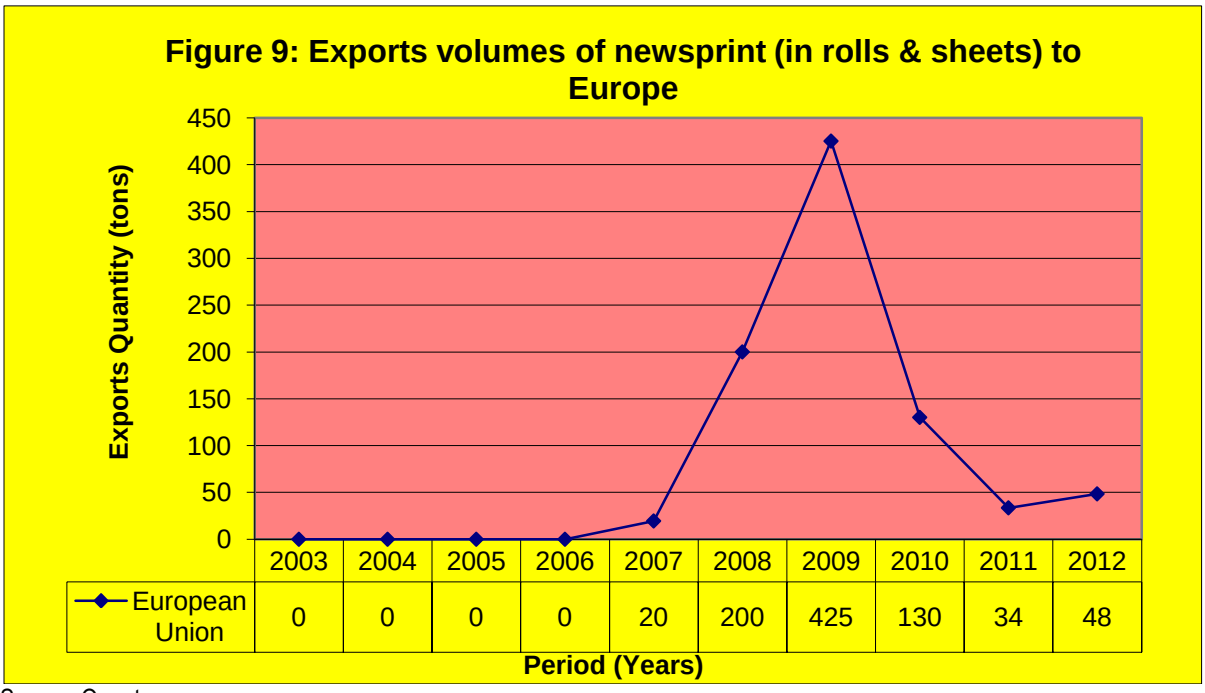


Source: Quantec

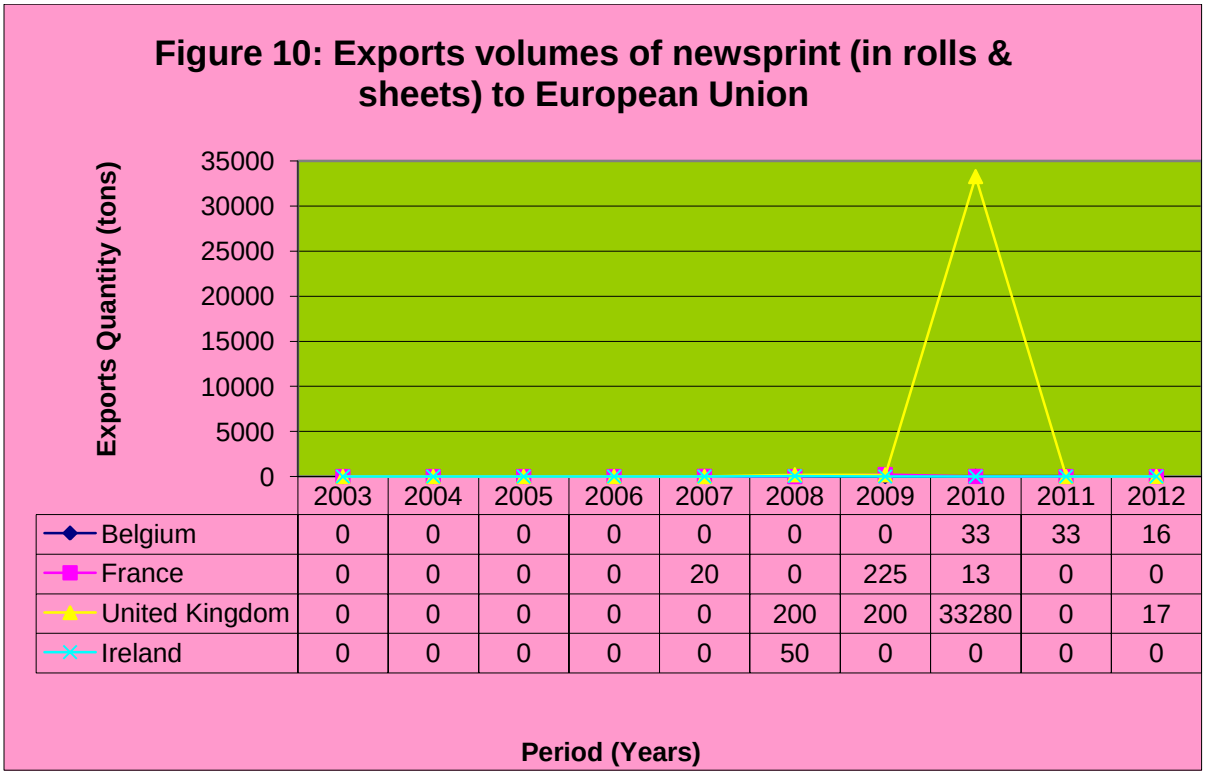
Figure 8 reflects exports volumes of newsprint paper (in rolls and sheets) from South Africa to the Americas over the past ten years. The graph further reflects that the major market for newsprint paper, in rolls and sheets exports from South Africa to Americas was South America, followed by very low levels of exports of newsprint paper from South Africa to NAFTA during the period under scrutiny. The graph also reflects that exports of newsprint paper, in rolls and sheets from South Africa to South America started to increase in 2008 and at the same time attained a peak at approximately 2 535 tons. In 2011, a peak was again attained at an export quantity of approximately 1 961 tons. The graph further reflects that between 2002 and 2007, there were no exports of newsprint paper, in rolls and sheets from South Africa to Americas (South America and NAFTA) during the period under scrutiny. The graph also reflects that South Africa managed to export newsprint paper, in rolls and sheets to NAFTA only in 2011 at approximately 638 tons. The graph also reflects that there was 100% decline in exports volumes of newsprint paper (in rolls and sheets) from South Africa to South America in 2012 as compared to 2011.

Figure 9 below shows exports volumes of newsprint paper (in rolls and sheets) from South Africa to Europe between 2003 and 2012 period. The graph further shows that the major market for newsprint paper, in rolls and sheets exports from South Africa to Europe was European Union, with no competition from other European regions during the period under examination. The graph also shows that exports of newsprint paper, in rolls and sheets from South Africa to the European Union started to increase in 2007, with a sharp increase in 2008 until a peak was attained in 2009 at an export quantity of approximately 425.19 tons. The graph also shows that between 2010 and 2011 period, there was a sharp and consistent decline in exports volumes of newsprint paper, in rolls and sheets from South Africa to European Union. The graph further shows that between 2002 and 2006, there were no exports of newsprint paper, in rolls and sheets from South Africa to Europe. The graph also shows that

in 2012, South Africa's exports volumes of newsprint paper, in rolls and sheets to the European Union experienced a slight increase of 48 tons. The slight increase in volumes of newsprint paper, in rolls and sheets from South Africa to the European Union represents 45.5% in 2012 as compared to 2011.



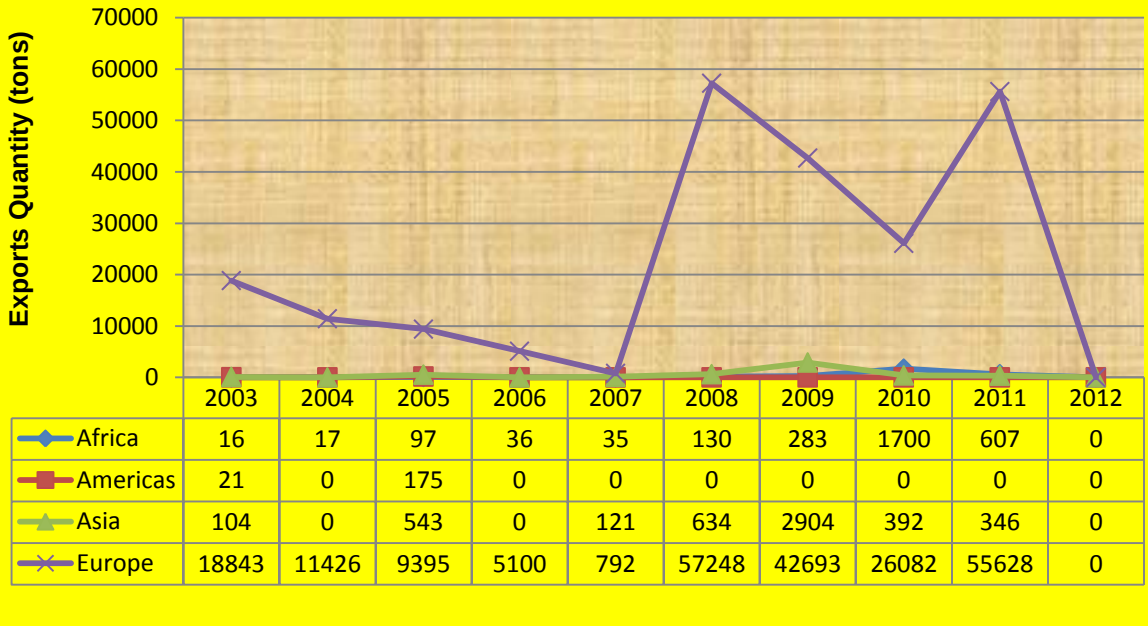
Source: Quantec



Source: Quantec

Figure 10 indicates exports volumes of newsprint paper (in rolls and sheets) from South Africa to the European Union over the past decade. The graph further shows that the major market for newsprint paper, in rolls and sheets exports from South Africa to Europe was United Kingdom, with no competition from other European regions during the period under examination. The graph also indicates that exports volumes of newsprint paper, in rolls and sheets from South Africa to the European Union started to increase in 2010, and at the same time attained a peak in 2010 at an export quantity of approximately 33 280 tons. The graph also indicates that between 2011 and 2012, there was a sharp decline in exports volumes of newsprint paper, in rolls and sheets from South Africa to European Union to approximately 17 tons. The graph further indicates that between 2003 and 2006, there were no exports of newsprint paper, in rolls and sheets from South Africa to the European Union countries. The graph further indicates that exports volumes of newsprint paper, in rolls and sheets from South Africa to United Kingdom experienced a decline in 2011 and a slight increase of about 17 tons in 2012. The slight increase in exports volumes of newsprint paper (in rolls and sheets) from South Africa to United Kingdom represents 100% in 2012 as compared to 2011.

Figure 11: Exports volumes of fuel wood (saw dust) in logs to various regions

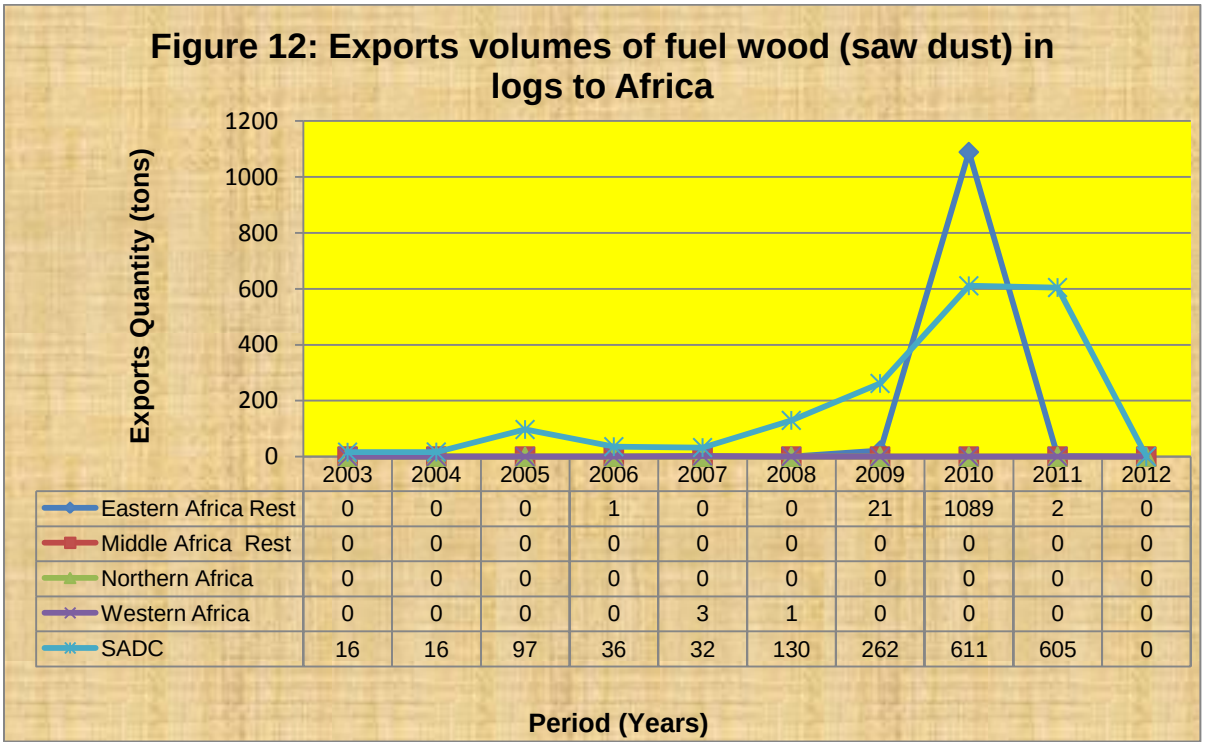


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	16	17	97	36	35	130	283	1700	607	0
Americas	21	0	175	0	0	0	0	0	0	0
Asia	104	0	543	0	121	634	2904	392	346	0
Europe	18843	11426	9395	5100	792	57248	42693	26082	55628	0

Source: Quantec

Figure 11 shows exports volumes of fuel wood (saw dust) in logs from South Africa to various regions between 2003 and 2012 period. The figure further indicates that during the period under scrutiny, the major markets for fuel wood (saw dust) in logs from South Africa to the world landed mainly in Europe, followed by very low or intermittent exports to Africa, Asia and Americas. Exports of fuel wood, in logs from South Africa to Europe started to increase in 2003 at approximately 18843 tons, with a consistent decline between 2004 and 2007 to lower levels of about 792 tons. The figure also shows that in 2008, exports of fuel wood, in logs experienced surge and at the same time attained a peak at an export volume of approximately 57 248 tons. In 2009 and 2010, exports volumes of fuel wood, in logs from

South Africa to Europe decrease dramatically to lower levels of approximately 26 082 and 42 693 tons respectively during the period under examination. The graph further shows that exports of fuel wood, in logs from South Africa to Europe experienced a second peak in 2011 at an export volume of approximately 55 628 tons during the same period under observation. The graph further shows that in 2012, there were no exports volumes of fuel wood, in logs from South Africa to Europe. The decline in exports volumes of fuel wood, in logs from South Africa to Europe in 2012 represents 100% decline as compared to 2011.

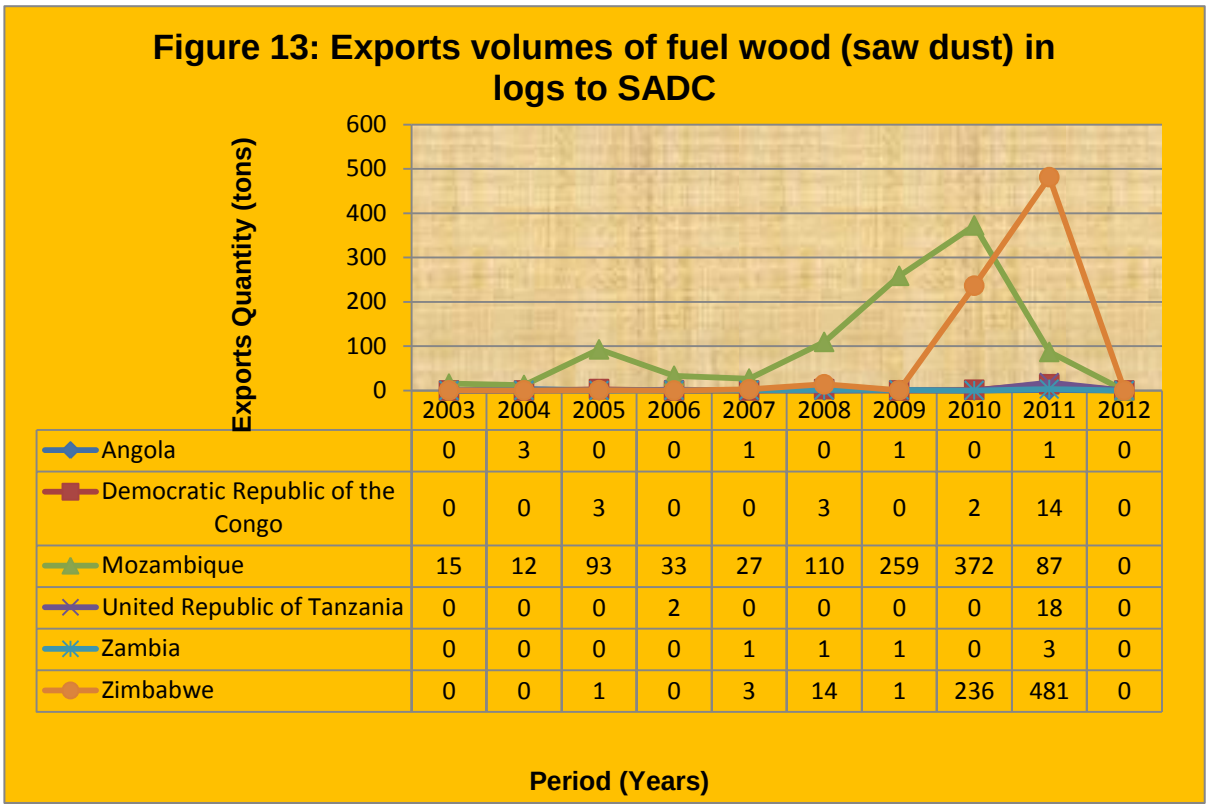


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Africa Rest	0	0	0	1	0	0	21	1089	2	0
Middle Africa Rest	0	0	0	0	0	0	0	0	0	0
Northern Africa	0	0	0	0	0	0	0	0	0	0
Western Africa	0	0	0	0	3	1	0	0	0	0
SADC	16	16	97	36	32	130	262	611	605	0

Source: Quantec

Figure 12 depicts exports volumes of fuel wood (saw dust) in logs from South Africa to Africa between 2003 and 2012 period. The graph further depicts that during the period under observation, Eastern Africa commanded the greatest market share of fuel wood, in logs exports from South Africa to Africa, followed by the SADC region. The figure also depicts that between 2003 and 2008; exports of fuel wood, in logs from South Africa to Eastern Africa experienced very low or intermittent levels of exports of fuel wood, in logs of below 1 ton per annum. The graph further depicts that exports of fuel wood, in logs started to increase in 2009 until a peak was attained in 2010 at an export quantity of approximately 1 089 tons. The graph also depicts that during the period under review, exports of fuel wood, in logs from South Africa to SADC attained a peak in 2010 and 2011 at approximately 604 and 611 tons respectively. Between 2003 and 2008, exports of fuel wood, in logs from South Africa to SADC experienced very low or intermittent exports of fuel wood, in logs of below 130 tons per annum.

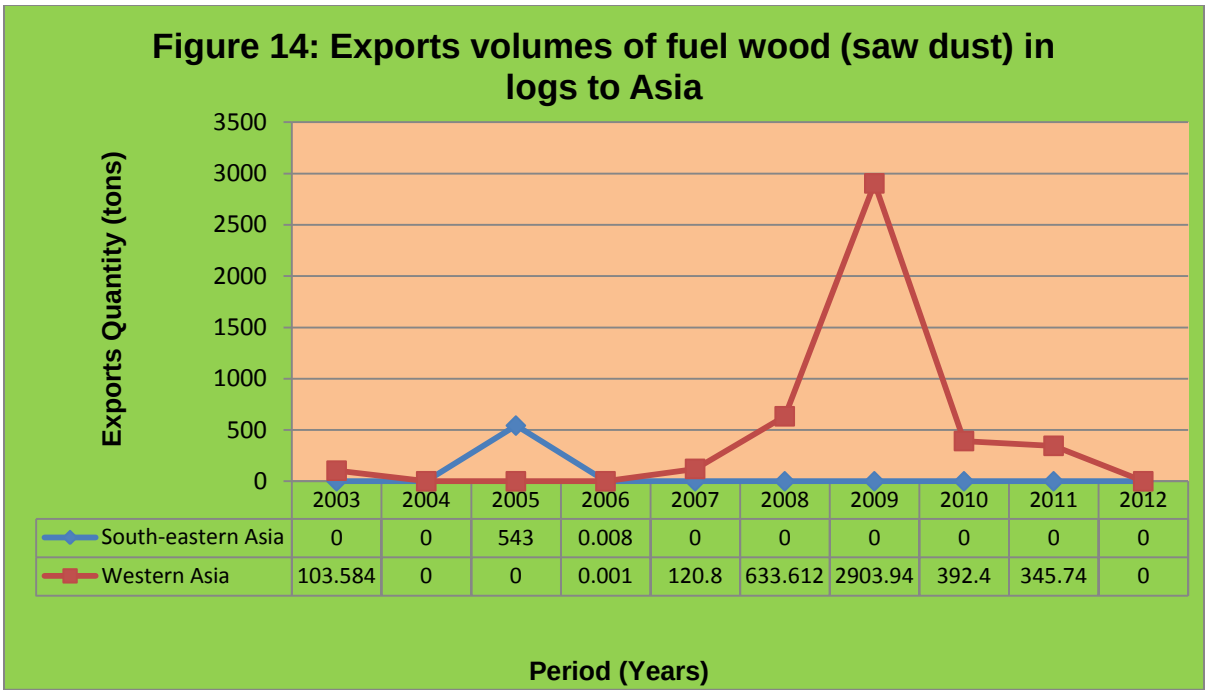
The graph further depicts that in 2012, there were no exports volumes of fuel wood, in logs from South Africa to the African regions. The decline in exports volumes of fuel wood, in logs from South Africa to Eastern Africa in 2012 represents 100% decline as compared to 2011.



Source: Quantec

Figure 13 shows exports volumes of fuel wood (saw dust) in logs from South Africa to SADC over the past ten years. The graph further shows that during the period under observation, Zimbabwe commanded the greatest market share of fuel wood, in logs exports from South Africa to SADC, followed by Mozambique. The figure also shows that between 2003 and 2008; exports of fuel wood, in logs from South Africa to both Zimbabwe and Mozambique experienced very low or intermittent levels of exports of fuel wood, in logs of below 110 tons per annum. The graph further shows that exports of fuel wood, in logs from South Africa to Zimbabwe started to increase in 2010 until a peak was attained in 2011 at an export quantity of approximately 481 tons. The graph also shows that during the period under review, exports of fuel wood, in logs from South Africa to Mozambique started to increase in 2005 and declined iin 2006 and 2007 at about 26 tons. The graph further shows that during the period under review, exports of fuel wood, in logs from South Africa to Mozambique saw a surge in exports until a peak was attained in 2010 at an export quantity of approximately 372 tons. Zambia, Angola, Malawi, Democratic Republic of Congo and Tanzania experienced very low quantities of exports of fuel wood from South Africa during the period under review.

The graph further shows that in 2012, there were no exports volumes of fuel wood, in logs from South Africa to SADC region. The decline in exports volumes of fuel wood, in logs from South Africa to Zimbabwe and Mozambique in 2012 represents 100% decline as compared to 2011

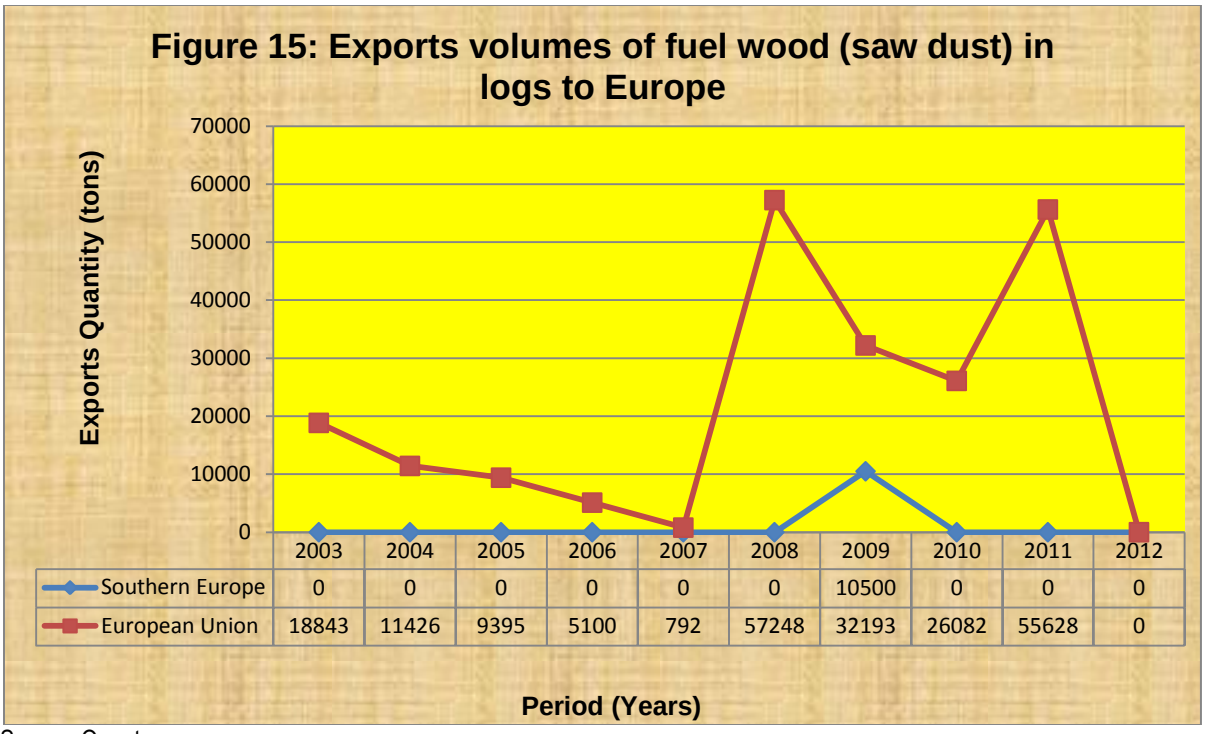


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
South-eastern Asia	0	0	543	0.008	0	0	0	0	0	0
Western Asia	103.584	0	0	0.001	120.8	633.612	2903.94	392.4	345.74	0

Source: Quantec

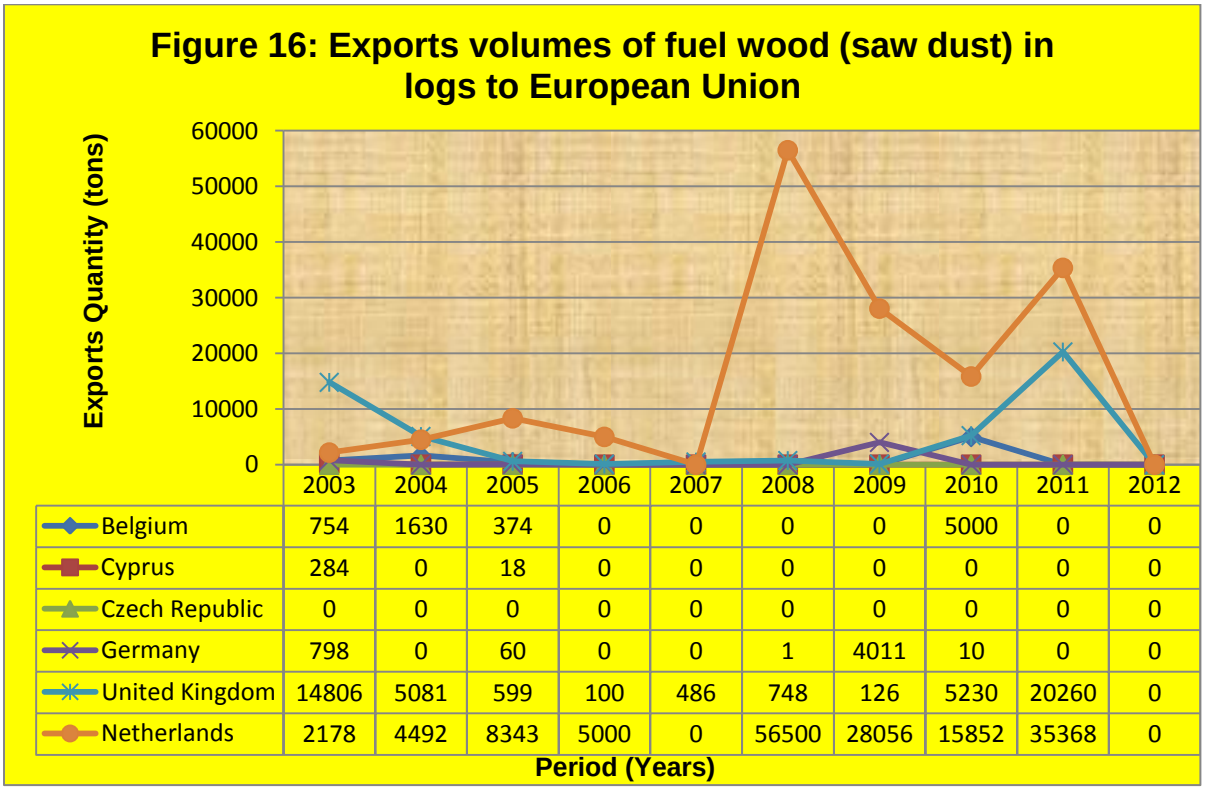
Figure 14 above indicates exports volumes of fuel wood (saw dust) in logs from South Africa to Asia between 2003 and 2012 period. The figure further indicates that during the period under review, the major export destination for fuel wood from South Africa to Asia was Western Asia, followed by very low or intermittent levels of exports to South-eastern Asia. The figure also indicates that exports of fuel wood from South Africa to Western Asia attained a peak in 2009 at an export volume of approximately 2 903 tons. The graph also indicates that exports of fuel wood from South Africa to Western Asia saw a sharp or a dramatic decline of up to 400 tons in 2010 and 2011 period respectively. The figure further indicates that in 2012 of the period under examination, there were no exports of fuel wood from South Africa to both Western Asia and South-eastern Asia. The decline in exports of fuel wood from South Africa to Western Asia represents 100% as compared to 2011.

Figure 15 below illustrates exports volumes of fuel wood (saw dust) in logs from South Africa to Europe over the past decade. The figure further illustrates that during the period under observation, the major export destination for fuel wood in logs from South Africa to Europe was the European Union, followed by very low or intermittent levels of exports to Southern Europe. The figure also illustrates that exports of fuel wood from South Africa to the European Union started to increase in 2003, with a consistent decline from 2004 to 2007 of below 793 tons. The figure also illustrates that exports volumes of fuel wood in logs from South Africa to European Union experienced a surge of exports volumes in 2008 and at the same time attained a peak both in 2008 and 2011 at export volumes of approximately 55 628 and 57 248 tons respectively. The figure also illustrates that exports volumes of fuel wood in logs from South Africa to European Union experienced a sharp in 2009 and 2010 of approximately 26 000 and 32 000 tons during the period under observation. In 2012, the figure further illustrates that there no exports volumes of fuel wood in logs from South Africa to both European Union and southern Europe.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Southern Europe	0	0	0	0	0	0	10500	0	0	0
European Union	18843	11426	9395	5100	792	57248	32193	26082	55628	0

Source: Quantec



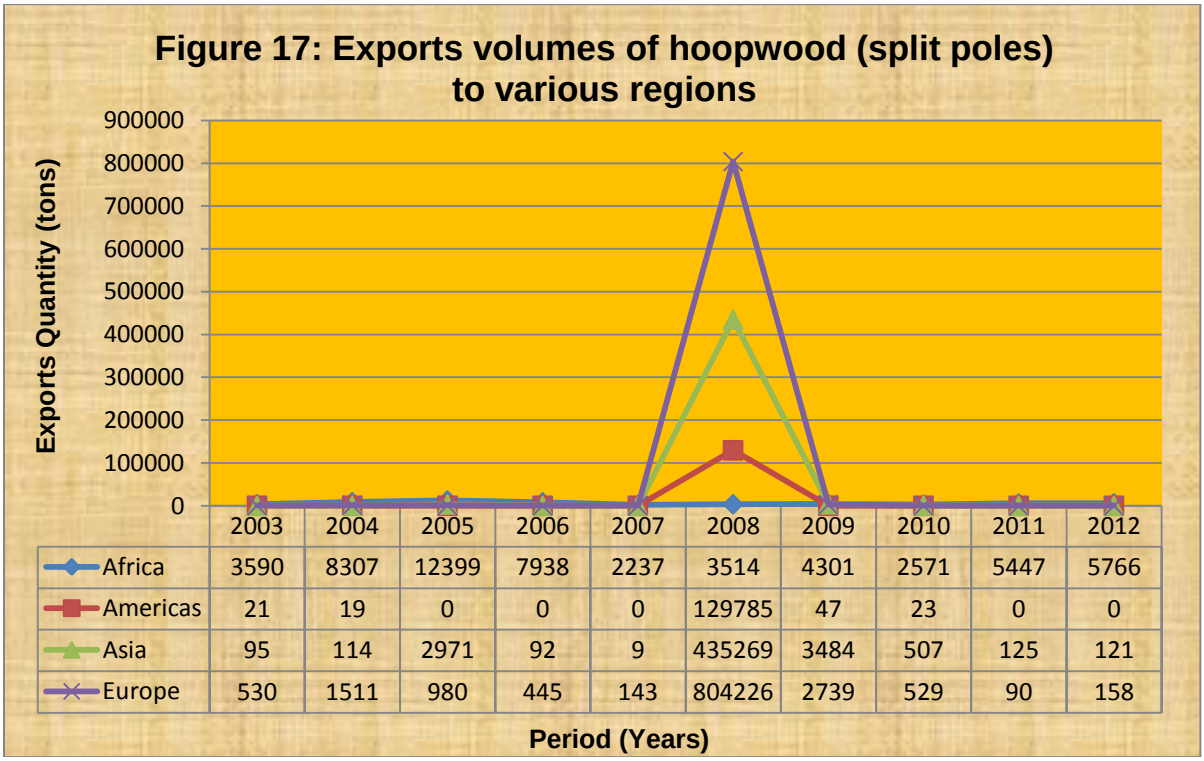
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Belgium	754	1630	374	0	0	0	0	5000	0	0
Cyprus	284	0	18	0	0	0	0	0	0	0
Czech Republic	0	0	0	0	0	0	0	0	0	0
Germany	798	0	60	0	0	1	4011	10	0	0
United Kingdom	14806	5081	599	100	486	748	126	5230	20260	0
Netherlands	2178	4492	8343	5000	0	56500	28056	15852	35368	0

Source: Quantec

Figure 16 illustrates exports volumes of fuel wood (saw dust) in logs from South Africa to European Union between 2003 and 2012 period. The figure further illustrates that during the period under

observation, the major export destination for fuel wood in logs from South Africa to Europe was the European Union, followed by very low or intermittent levels of exports to Southern Europe. The figure also illustrates that exports of fuel wood from South Africa to the European Union started to increase in 2002, with a greater increase in 2003 and a decline between 2004 and 2007 period. The figure also illustrates that exports of fuel wood in logs from South Africa to European Union experienced a surge of exports in 2008 and at the same time attained a peak in 2008 and 2011at an export volume of approximately 55 628 and 57 248 tons respectively. The figure also illustrates that exports of fuel wood from South Africa to European Union experienced a sharp in 2009 and 2010 of approximately 26 000 and 32 000 tons during the period under observation.

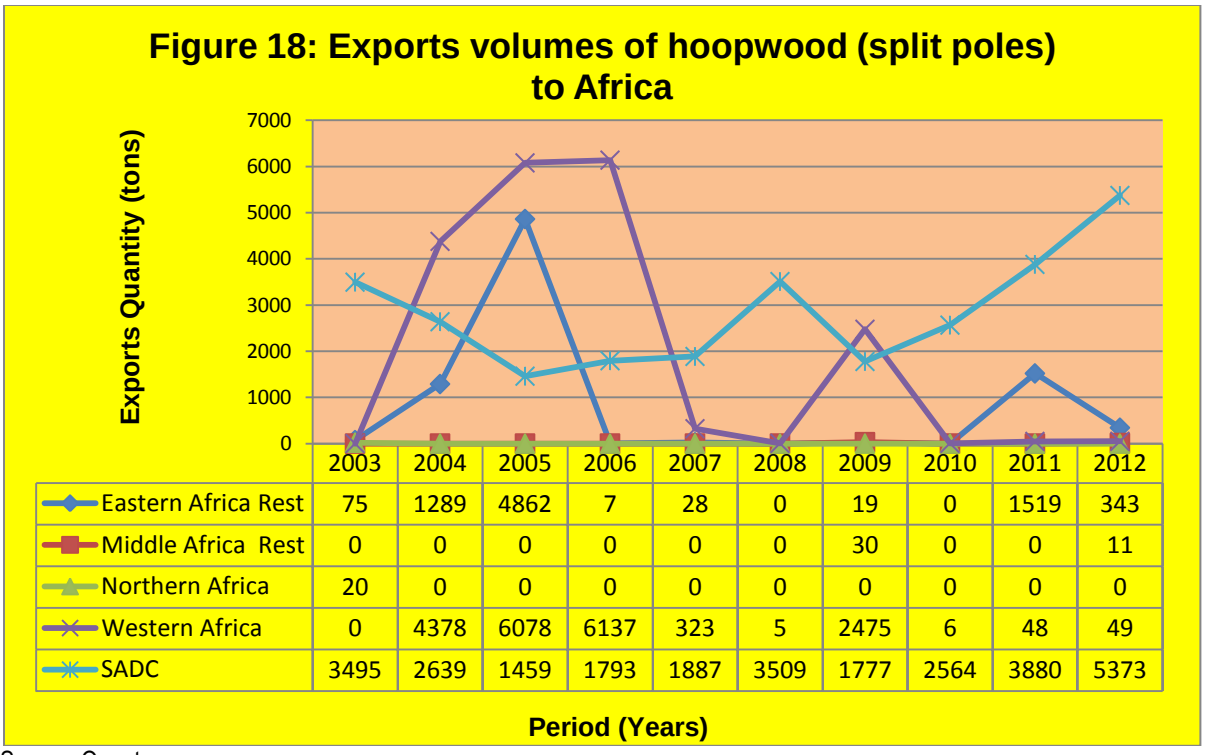
Figure 17: Exports volumes of hoopwood (split poles) to various regions



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	3590	8307	12399	7938	2237	3514	4301	2571	5447	5766
Americas	21	19	0	0	0	129785	47	23	0	0
Asia	95	114	2971	92	9	435269	3484	507	125	121
Europe	530	1511	980	445	143	804226	2739	529	90	158

Source: Quantec

Figure 17 shows exports of hoopwood (split poles) from South Africa to various regions between 2003 and 2012 period. The graph further shows that during the period under examination, the major market for hoopwood exports from South Africa to the world was Europe, followed by Asia and very low or intermittent levels of exports to Americas. The graph also shows that exports of hoopwood from South Africa to Europe started to increase in 2003 until a peak was attained in 2008 at an export quantity of about 804 226 tons. The graph further shows that exports volumes of hoopwood from South Africa to Europe experienced a dramatic decline between 2009 and 2012 to lower levels of below 3000 tons per annum in 2009. In 2012, exports volumes of hoopwood from South Africa to Europe saw a slight increase and a recovery in volume terms at approximately 157 tons as compared to 90 tons in 2011. The graph also shows that exports of hoopwood from South Africa to Asia attained a peak also in 2008 at an export quantity of about 435 269 tons. The slight increase in exports volumes of hoopwood from South Africa to Europe represents 74.5% as compared to 2011.

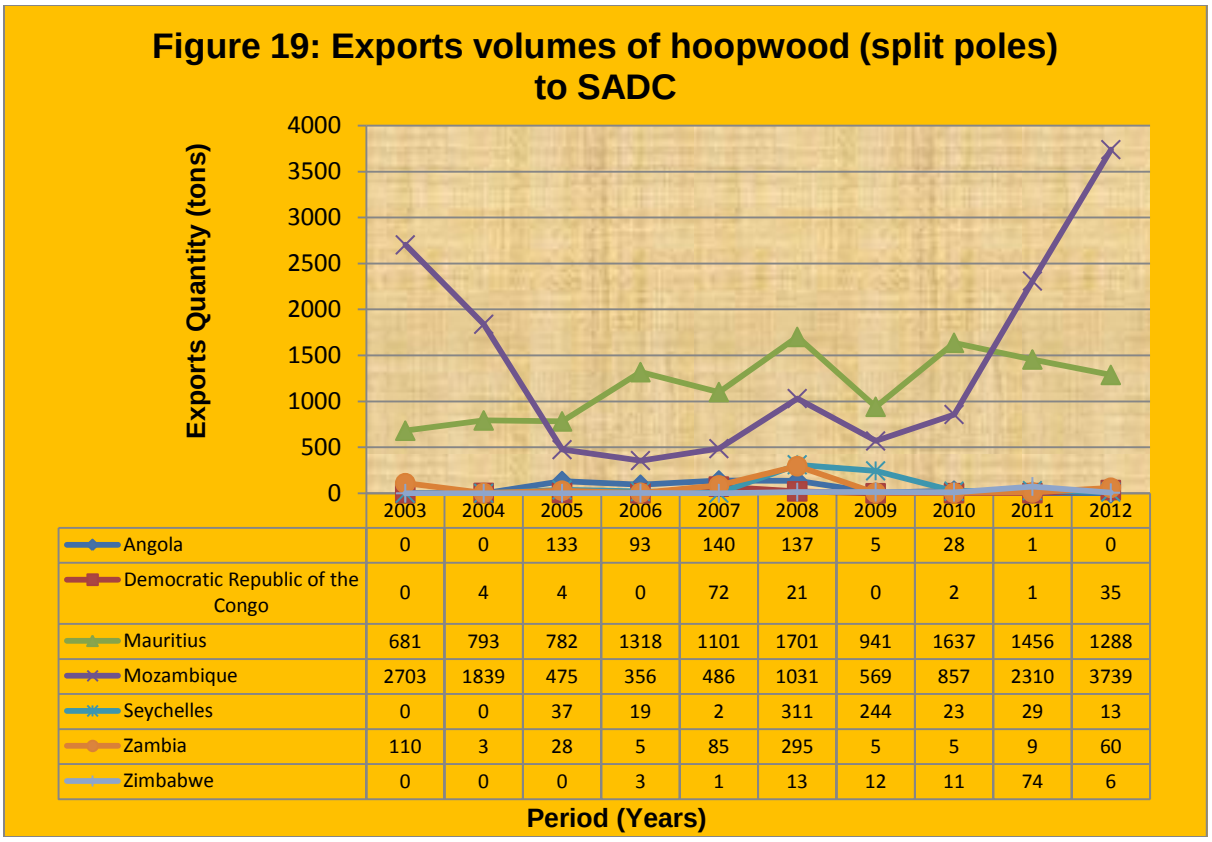


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Africa Rest	75	1289	4862	7	28	0	19	0	1519	343
Middle Africa Rest	0	0	0	0	0	0	30	0	0	11
Northern Africa	20	0	0	0	0	0	0	0	0	0
Western Africa	0	4378	6078	6137	323	5	2475	6	48	49
SADC	3495	2639	1459	1793	1887	3509	1777	2564	3880	5373

Source: Quantec

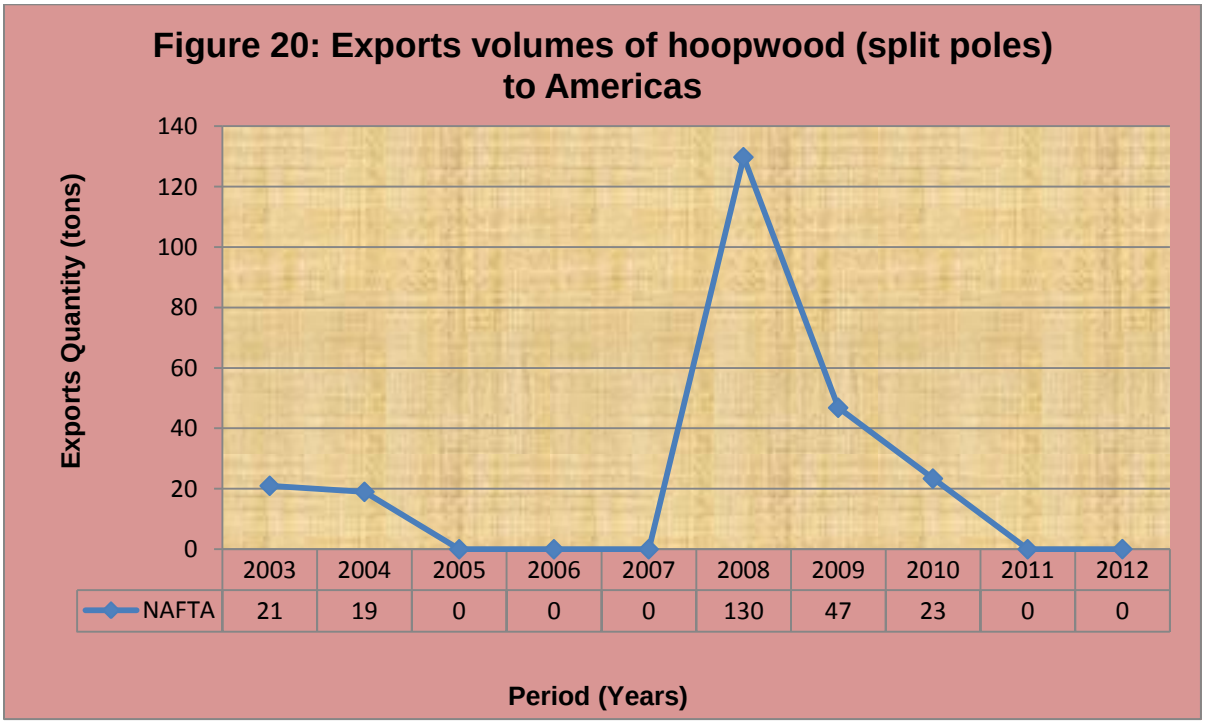
Figure 18 reflects exports of hoopwood (split poles) from South Africa to Africa over the past ten years. The figure further reflects that during the period under observation, the major market for hoopwood exports from South Africa to Africa was Western Africa, followed by SADC and Eastern Africa. The figure also reflects that exports of hoopwood from South Africa to Western Africa started to increase in 2004 until a peak was attained in 2005 and 2006 at an export quantity of about 6077 and 6137 tons respectively. The figure further reflects that exports of hoopwood from South Africa to Eastern Africa started to increase also in 2004 until a peak was attained in 2005 at an export quantity of about 4 862 tons, while exports of hoopwood from South Africa to SADC attained a peak in 2012 at export quantities of about 5373 tons. The slight increase in exports volumes of hoopwood from South Africa to Western Africa in 2012 represents 10.4% as compared to 2011.

Figure 19 below depicts exports volumes of hoopwood (splits poles) from South Africa to SADC between 2003 and 2012 period. The figure further depicts that during the period under observation, exports of hoopwood from South Africa to SADC went to Mozambique, followed by Mauritius. The figure also depicts that exports of hoopwood from South Africa to Mozambique started to increase in 2003 until a consistent decline occurred between 2004 and 2006 of up to 356 tons. The figure also depicts that in 2010, exports of hoopwood from South Africa to Mozambique started to increase until a peak was attained in 2012 at an export quantity of about 3738 tons. The figure further depicts that exports of hoopwood from South Africa to Mauritius attained a peak in 2008 at an export volume of about 1701 tons**.** The figure further depicts that exports of hoopwood from South Africa to Angola, Zambia, DRC and Seychelles were very low or intermittent between 2003 and 2012 period under scrutiny. The dramatic increase in exports volumes of hoopwood from South Africa to Mozambique in 2012 represents 61.9% as compared to 2011.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Angola	0	0	133	93	140	137	5	28	1	0
Democratic Republic of the Congo	0	4	4	0	72	21	0	2	1	35
Mauritius	681	793	782	1318	1101	1701	941	1637	1456	1288
Mozambique	2703	1839	475	356	486	1031	569	857	2310	3739
Seychelles	0	0	37	19	2	311	244	23	29	13
Zambia	110	3	28	5	85	295	5	5	9	60
Zimbabwe	0	0	0	3	1	13	12	11	74	6

Source: Quantec

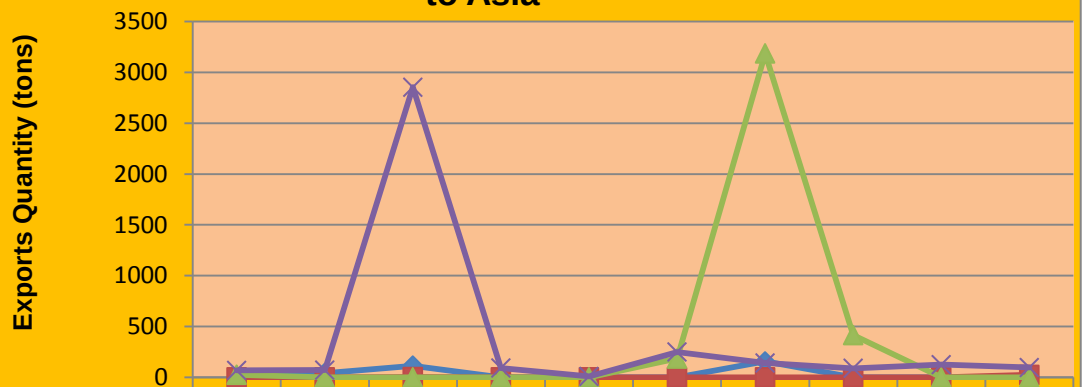


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
NAFTA	21	19	0	0	0	130	47	23	0	0

Source: Quantec

Figure 20 illustrates exports volumes of hoopwood (split poles) from South Africa to Americas between 2003 and 2012 period. The graph further illustrates that during the period under review, NAFTA was the main export destination for hoopwood exports from South Africa to Americas. The figure also illustrates that during the period under examination; exports of hoopwood from South Africa to NAFTA started to increase in 2003, and declined between 2004 and 2007 until a peak was attained in 2008 at an export quantity of about 129 tons. The figure further illustrates that during the period under review, there were no exports of hoopwood from South Africa to NAFTA between 2005 and 2007 and again in 2011. In 2012, there was a slight increase in exports volumes of hoopwood from South Africa to NAFTA of about 0.05 tons. The slight increase in exports volumes of hoopwood from South Africa to NAFTA in 2012 represents 100% as compared to 2011.

Figure 21: Exports volumes of hoopwood (split poles) to Asia



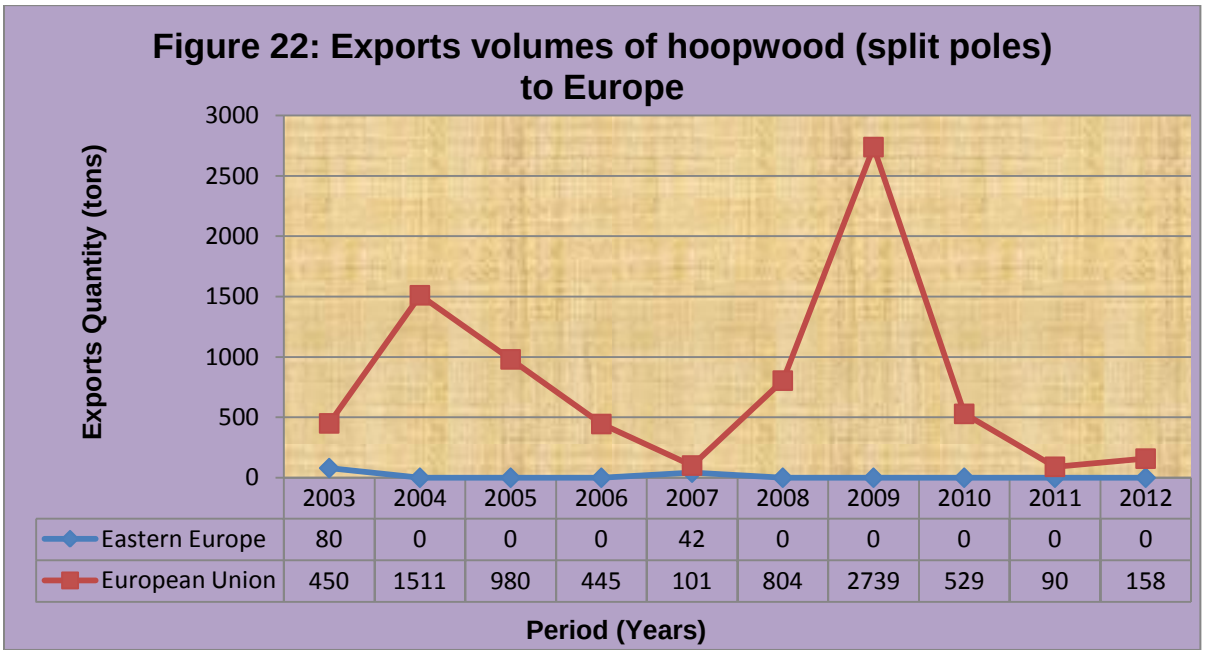
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Asia	0	42	115	0	0	0	156	0	0	0
South-central Asia	0	0	3	0	0	0	0	1	0	24
South-eastern Asia	26	0	0	0	0	185	3187	416	0	0
Western Asia	69	72	2853	92	9	250	142	90	125	97

Period (Years)

Source: Quantec

Figure 21 illustrates exports volumes of hoopwood (split poles) from South Africa to Asia between 2003 and 2012 period. The graph further illustrates that during the period under review, South-eastern Asia was the main export destination for hoopwood exports from South Africa to Asia, followed by Western Asia. The figure also illustrates that during the period under examination, exports of hoopwood from South Africa to South-eastern Asia started to increase in 2004, and at the same time in 2008 until a peak was attained in 2009 at an export quantity of about 3 186 tons. The figure further illustrates that during the period under review, exports of hoopwood from South Africa to Western Asia started to increase also in 2003 and a decline occurred in 2004, until a peak was attained in 2005 at an export quantity of about 2 853 tons. Between 2004 and 2007, and again between 2011 and 2012, there were no exports volumes of hoopwood from South Africa to South-eastern Asia. The figure also illustrates that 20032 and again between 2006 and 2008 and between 2010and 2012, there were no exports of hoopwood from South Africa to Eastern Asia.

The figure further illustrates that there was 100% decline in exports volumes of hoopwood from South Africa to South-eastern Asia in 2012 as compared to 2011.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Europe	80	0	0	0	42	0	0	0	0	0
European Union	450	1511	980	445	101	804	2739	529	90	158

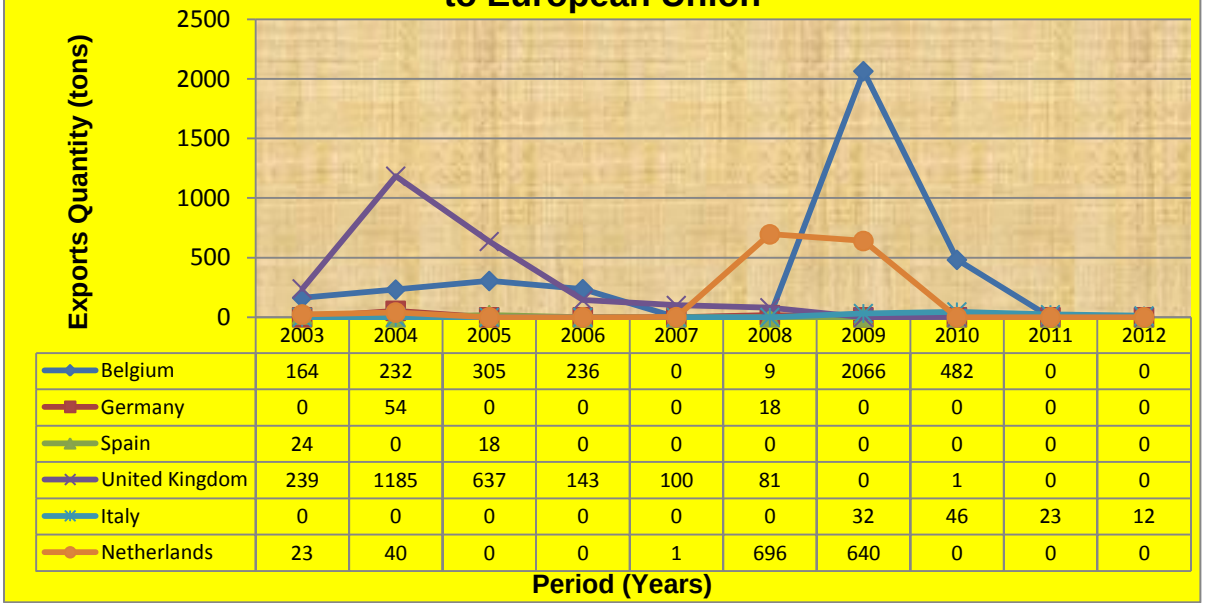
Source: Quantec

Figure 22 shows exports volumes of hoopwood (split poles) from South Africa to Europe between 2003 and 2012. The figure further shows that during the period under observation, European Union was the major export destination for hoopwood exports from South Africa to Europe, followed by very low or intermittent exports of hoopwood from South Africa to Eastern Europe. The figure also shows that exports of hoopwood from South Africa to European Union started to increase in 2003, with a slight increase in 2004 and a consistent decline of up to 101 tons in 2007. In 2008, exports volumes of exports of hoopwood from South Africa to European Union slightly increased until a peak was attained in 2009 at approximately 2738 tons. The figure further shows that exports volumes of hoopwood from South Africa to European Union experienced a dramatic decline between 2010 and 2011. In 2012, exports volumes of hoopwood from South Africa to European Union slightly increased to levels close to 157 tons. The graph further shows that between 2004 and 2006, and again between 2008 and 2012, there were no exports volumes of hoopwood from South Africa to Eastern Europe. The figure further shows that there was 74.4% increase in exports volumes of hoopwood from South Africa to European Union in 2012 as compared to 2011.

Figure 23 below illustrates exports volumes of hoopwood (split poles) from South Africa to European Union over the past ten years. The figure further illustrates that during the period under review, Belgium was the major export destination for hoopwood from South Africa to European Union, followed by United Kingdom and Netherlands. The figure also illustrates that during the period under observation, exports volumes of hoopwood from South Africa to Belgium started to increase in 2004 to 2006, until a slight decline in 2007 and 2008 respectively with approximately 0 and 9.1 tons. Exports volumes of hoopwood from South Africa to Belgium attained a peak in 2009 at an export quantity of about 2 066 tons, followed by United Kingdom with a peak in 2004 at approximately 1 185 tons. The figure also illustrates that exports volumes of hoopwood from South Africa to Netherlands attained its peak in 2008

at approximately 696 tons during the period under review. The figure further illustrates that South Africa did not export hoopwood (split poles) to Italy between 2003 and 2008. The figure also illustrates that in 2012; only Italy managed to import volumes of hoopwood from South Africa of about 12 tons. The figure further illustrates that there was 100% decline in exports volumes of hoopwood from South Africa to Belgium in 2012 as compared to 2010.

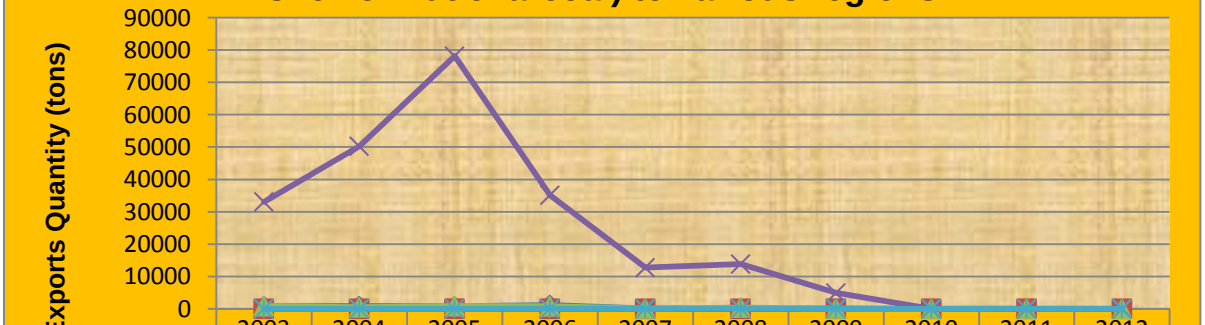
Figure 23: Exports volumes of hoopwood (split poles) to European Union



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Belgium	164	232	305	236	0	9	2066	482	0	0
Germany	0	54	0	0	0	18	0	0	0	0
Spain	24	0	18	0	0	0	0	0	0	0
United Kingdom	239	1185	637	143	100	81	0	1	0	0
Italy	0	0	0	0	0	0	32	46	23	12
Netherlands	23	40	0	0	1	696	640	0	0	0

Source: Quantec

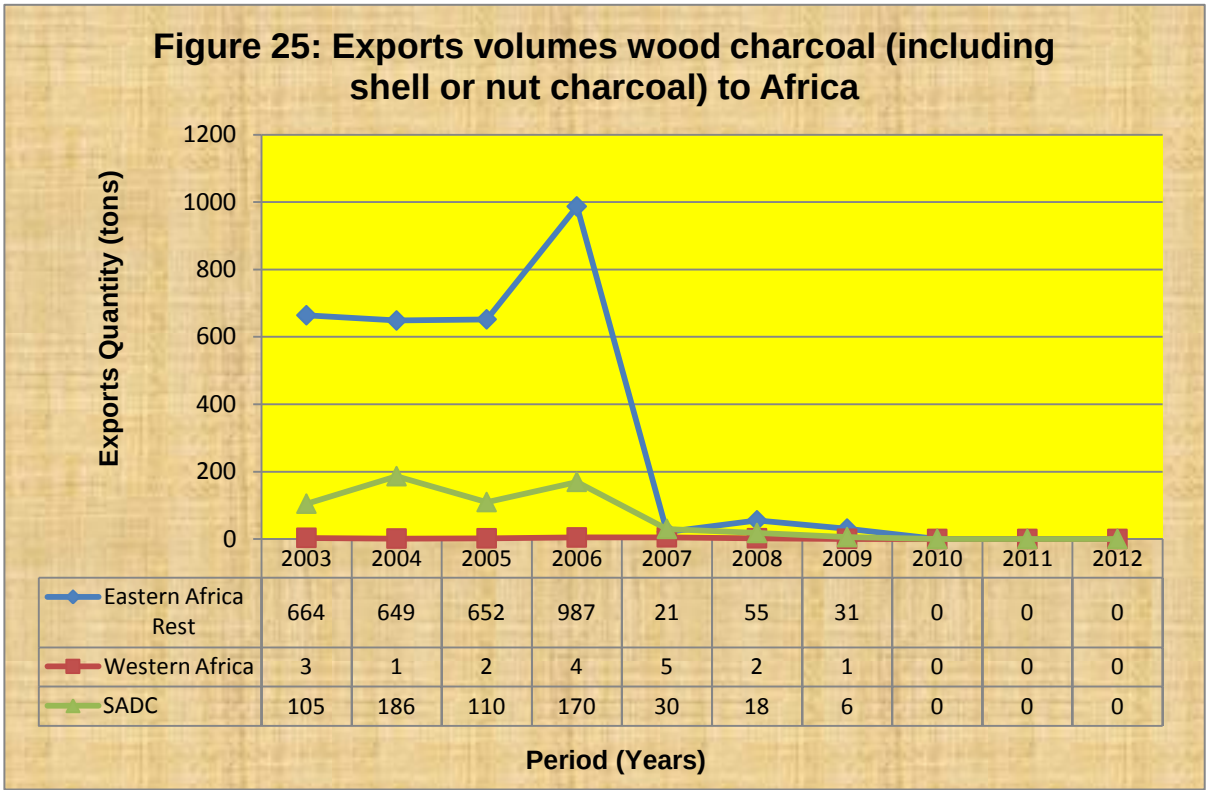
Figure 24: Exports volumes of wood charcoal (including shell or nut charcoal) to various regions



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	772	836	764	1161	56	75	37	0	0	0
Americas	0	0	22	0	2	0	16	0	0	0
Asia	839	420	829	747	83	370	61	0	0	0
Europe	33066	50262	78138	35131	12725	13841	4881	0	0	0
Oceania	3	2	2	30	13	30	1	0	0	0

Source: Quantec

Figure 24 depicts exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to various regions between 2003 and 2012 period. The graph further depicts that during the period under examination, exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to various regions mainly landed in Europe, with no competition from the other regions of the world. The graph clearly depicts that South Africa could not export its wood charcoal to the world between 2010 and 2012 of the period under observation. Exports of wood charcoal from South Africa to the world started to increase in 2003 until a peak was attained in 2005 at approximately 78 137 tons during the period under examination. The graph further depicts that exports of wood charcoal from South Africa to Europe saw a consistent decline of wood charcoal from 2006 to lower levels of 4 4880 tons in 2009. The graph further depicts that there was 100% decline in exports volumes of hoopwood from South Africa to Europe in 2010, 2011 and 2012 as compared to 2009.

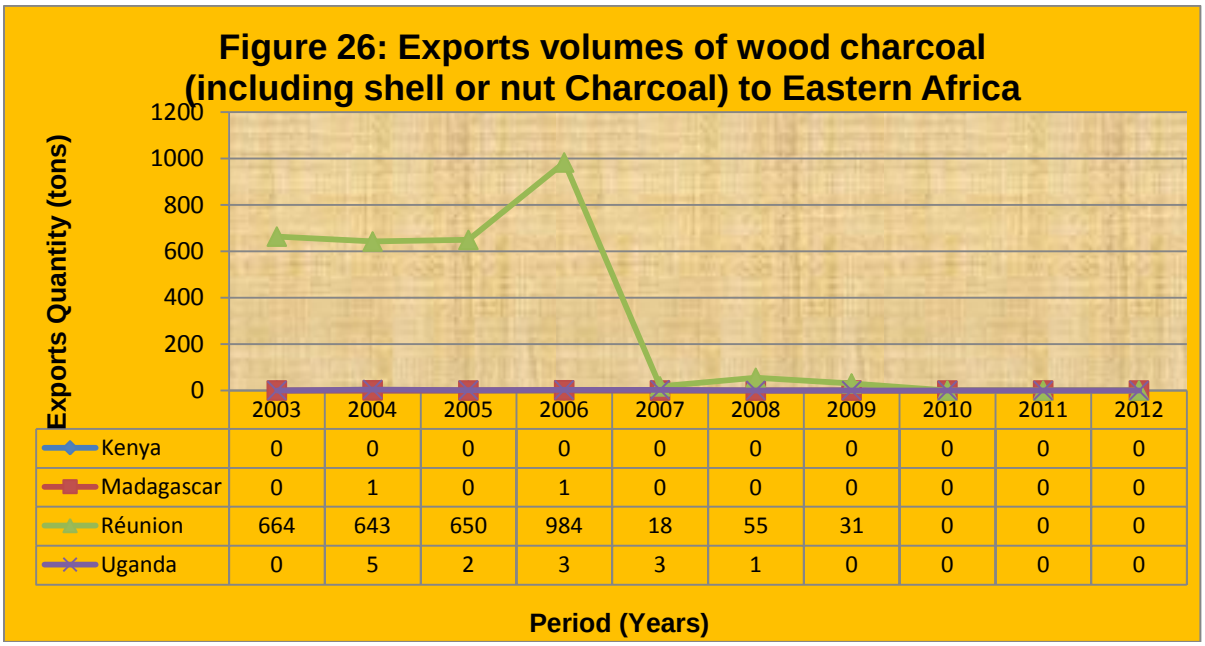


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Africa Rest	664	649	652	987	21	55	31	0	0	0
Western Africa	3	1	2	4	5	2	1	0	0	0
SADC	105	186	110	170	30	18	6	0	0	0

Source: Quantec

Figure 25 indicates exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Africa between 2003 and 2012 period. The figure further indicates that during the period under scrutiny, Eastern Africa was the major export market for wood charcoal from South Africa to Africa, followed by SADC. The figure also indicates that during the period under scrutiny, exports volumes of wood charcoal from South Africa to Eastern Africa started to increase in 2003 and slight declined in 2004 at about 648 tons. The figure also indicates that in 2005, exports volumes of wood charcoal from South Africa to Eastern Africa slightly increased until a peak was attained in 2006 at an export quantity of about 987 tons. Also important to note was that South Africa did not export wood charcoal to Africa between 2010 and 2012. Exports volumes of wood charcoal from South Africa to SADC indicates that there was a dramatic decline in exports of wood charcoal between 2003 and 2012 of up to 5.5 tons in 2009.

The figure further indicates that there was 100% decline in exports volumes of hoopwood from South Africa to SADC, Eastern and Western Africa in 2010, 2011 and 2012 as compared to 2009.

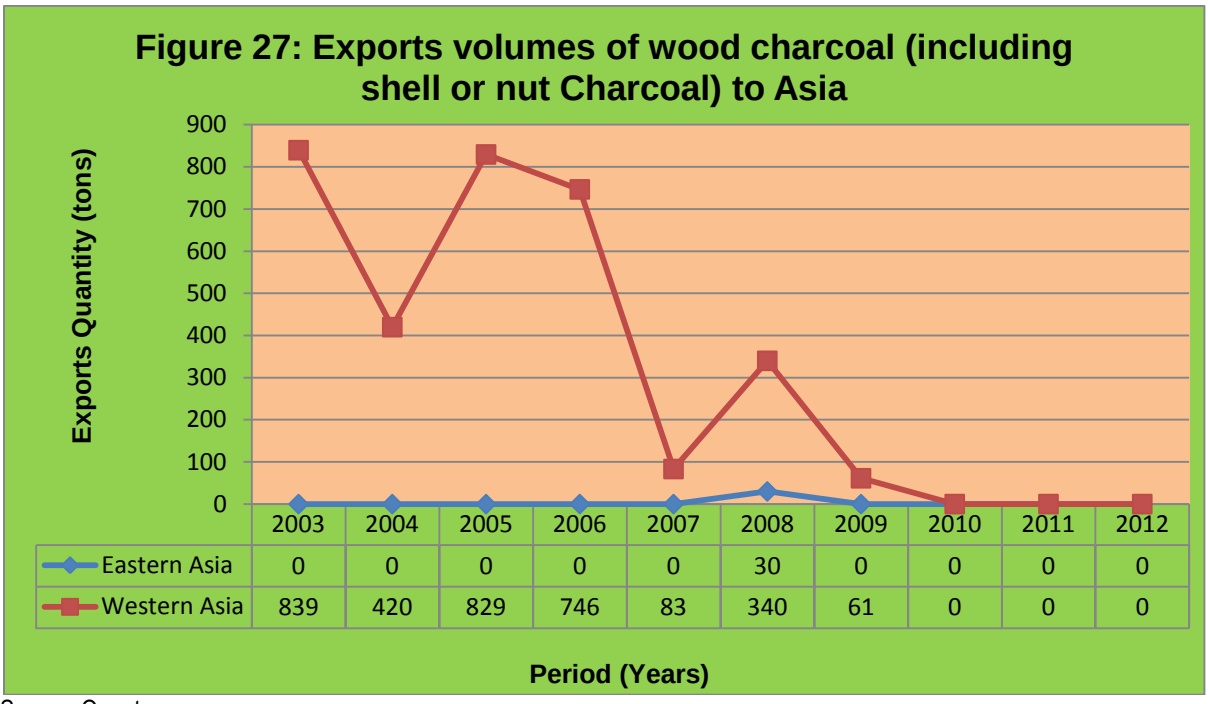


Source: Quantec

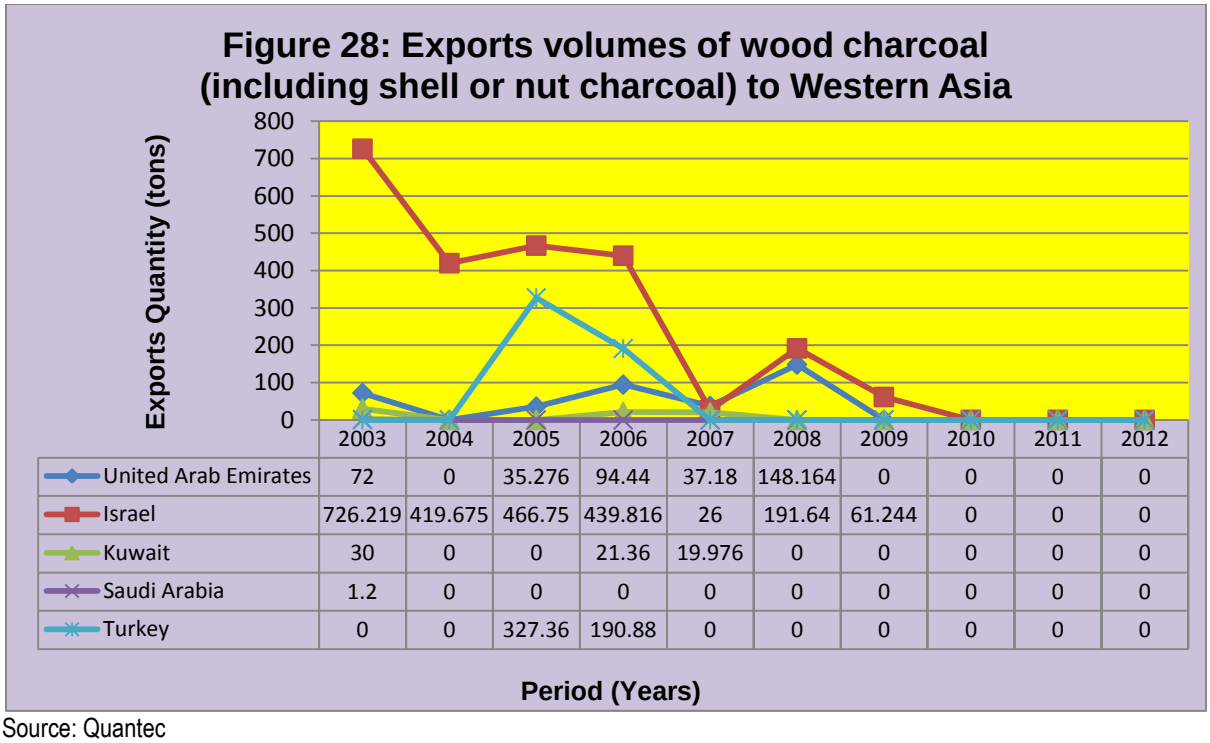
Figure 26 indicates exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Eastern Africa over the past decade. The figure further indicates that during the period under scrutiny, Reunion was the major export market for wood charcoal from South Africa to Africa, woth no competition from other Eastern African countries. The figure also indicates that during the period under scrutiny, exports of wood charcoal from South Africa to Reunion started to increase in 2003 and until a peak was attained 2006 at an export quantity of about 983 tons. Also important to note was that South Africa did not export wood charcoal to Eastern Africa between 2010 and 2012. The figure also indicates that exports of wood charcoal from South Africa to Reunion saw a dramatic decline in exports of wood charcoal between 2007 and 2012 to lower levels of about 18 tons in 2007. Exports of wood charcoal from South Africa to Eastern Africa indicates that between 2007 and 2012, there were no exports volumes of wood charcoal from South Africa to Kenya and Madagascar. The figure further indicates that there was 100% decline in exports volumes of hoopwood from South Africa to Reunion in 2010, 2011 and 2012 as compared to 2009.

Figure 27 below shows exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Asia over the past decade. The graph further shows that during the period under examination, the major export market for wood charcoal from South Africa to Asia was mainly Western Asia, followed by very minimal or insignificant volumes of wood charcoal from South Africa to Eastern Asia during the period under examination. The graph also shows that exports of wood charcoal from South Africa to Western Asia started to increase in 2003 and at the same time attained a peak at an export volume of about 1 181 tons. The graph also shows that during the period under review; exports of wood charcoal from South Africa to Western Asia declined dramatically from 2003 to 2012 to lower volumes of approximately 61.2 tons in 2010. The graph further shows that between 2011 and 2012,

there were no exports volumes of wood charcoal from South Africa to Western Asia. The decline in exports volumes of wood charcoal from South Africa to Western Asia in 2011and 2012 represents 100% as compared to 2010.



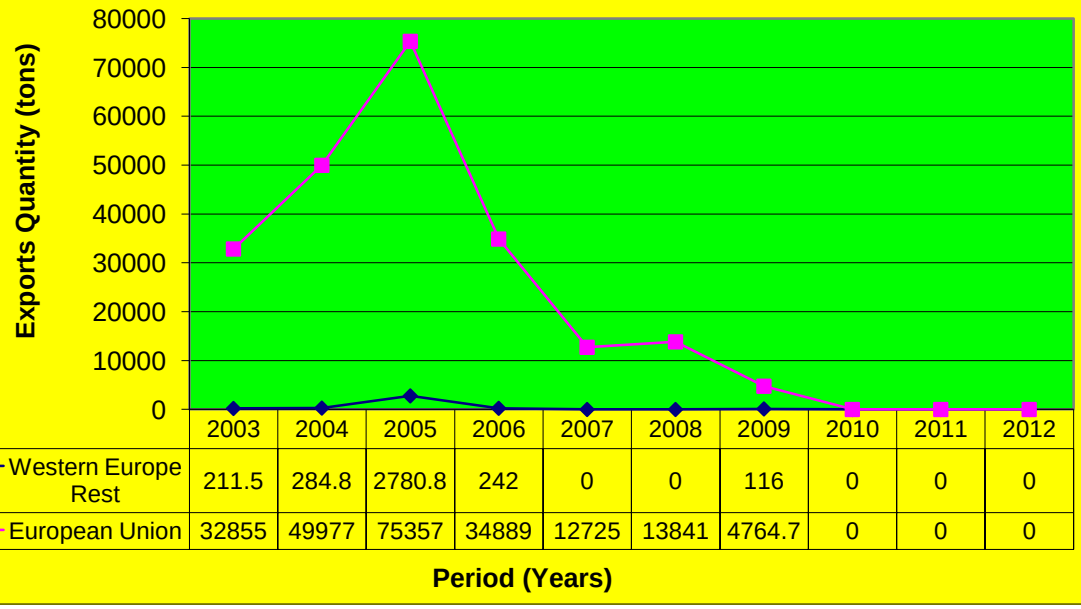
Source: Quantec



Source: Quantec

Figure 28 shows exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Western Asia between 2003 and 2012 period. The graph further shows that during the period under examination, the major export market for wood charcoal from South Africa to Asia was mainly Israel, followed by Turkey and very minimal or insignificant volumes of wood charcoal from South Africa to United Arab Emirates, Saudi Arabia and Kuwait during the period under examination. The graph also shows that exports volumes of wood charcoal from South Africa to Israel started to increase in 2003 and at the same time attained a peak at an export volume of about 726 tons. The figure also shows that during the period under review; South Africa did not export wood charcoal to Western Asia between 2010 and 2012. The graph also shows that Saudi Arabia only managed to export wood charcoal from South Africa in 2003 at approximately 1.2 tons. From 2004 to 2012, exports volumes of wood charcoal from South Africa to Israel declined to lower volumes of between 26 and 61 tons respectively in 2007 and 2009. The decline in exports volumes of wood charcoal from South Africa to Israel in 2010, 2011 and 2012 represents 100% as compared to 2009.

Figure 29: Exports volumes of wood charcoal (including shell or nut charcoal) to Europe

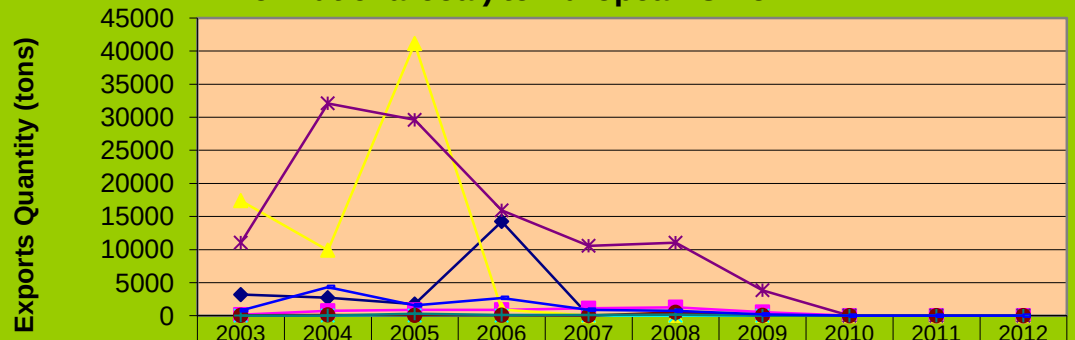


Source: Quantec

Figure 29 depicts exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Europe between 2003 and 2012 period. The graph further depicts that during the period under observation, the major export market for wood charcoal from South Africa to Europe was European Union, followed by very low export volumes of wood charcoal to Western Europe. The graph also depicts that exports volumes of wood charcoal from South Africa to the European Union started to increase in 2003, until a peak was attained in 2005 at an export quantity of approximately 75 357 tons during the same period under scrutiny. From 2006 to 2007, exports volumes of wood charcoal from South Africa to European Union saw a dramatic decline of nearly 40 000 tons in 2006, as compared to a peak in 2005 which attained approximately 75 000 tons. The graph also depicts that between 2010 and 2012, there were no exports of wood charcoal from South Africa to the European Union. The graph further depicts that South Africa exported a maximum of 2 780 tons of wood charcoal to Western

Europe Rest in 2005, with no exports of wood charcoal from South Africa to Western Europe between 2007 and 2008, and again between 2010 and 2012 period. The graph also indicates that there was 100% decline in exports volumes of wood charcoal from South Africa to the European Union in 2010, 2011 and 2012 as compared to 2009.

Figure 30: Exports volumes of wood charcoal (including shell or nut charcoal) to European Union



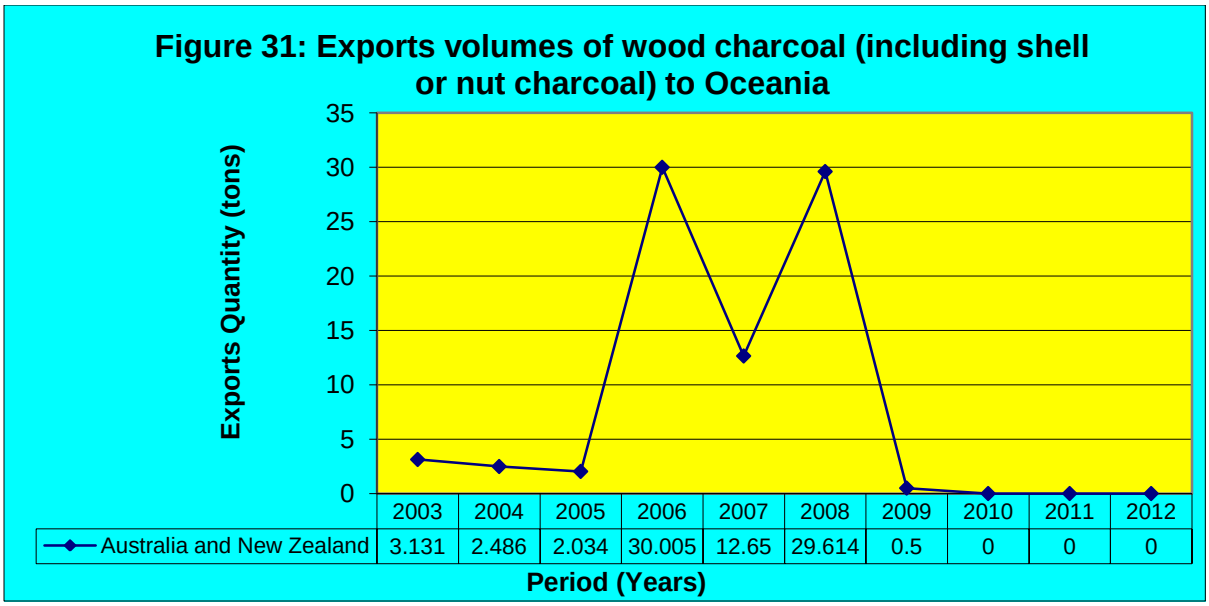
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Belgium	3181	2706.1	1747.5	14242	0	9.195	0	0	0	0
Cyprus	152.26	730.73	862.96	887.76	1116.6	1281.4	547.06	0	0	0
Germany	17394	9904.1	41143	930.53	10.05	51.653	49	0	0	0
France	0.045	25.65	22.46	3.2	15.84	0	0	0	0	0
United Kingdom	11046	32105	29597	15919	10567	11031	3847	0	0	0
Greece	45.06	117.31	47.5	66	11.6	502.24	44	0	0	0
Ireland	13.222	34	310	108.3	99	153.94	0	0	0	0
Netherlands	804.12	4339.5	1556.5	2691.7	904	745.4	182.7	0	0	0

Period (Years)

Source: Quantec

Figure 30 shows exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to European Union over the past ten years. The figure further shows that during the period under observation, the major export market for wood charcoal from South Africa to the European Union was Germany, followed by United Kingdom and Belgium. The figure also shows that exports volumes of wood charcoal from South Africa to Germany attained a peak in 2005 at an export quantity of approximately 41 143 tons during the period under scrutiny, while exports volumes of wood charcoal from South Africa to United Kingdom attained a peak in 2004 at an export quantity of approximately 32 105 tons. The figure further shows that exports of wood charcoal from South Africa to Belgium attained a peak in 2006 at an export quantity of approximately 14 242 tons. The figure also shows that between 2010 and 2012, there were no exports of wood charcoal from South Africa to the European Union countries. The figure further shows that during the period under scrutiny, South Africa exported very low volumes of wood charcoal to European countries such as Netherlands, Cyprus, France, Greece and Ireland of not more than 5000 tons per annum.

The graph also shows that there was 100% decline in exports volumes of wood charcoal from South Africa to Germany, United Kingdom and Belgium in 2010, 2011 and 2012 as compared to 2009.

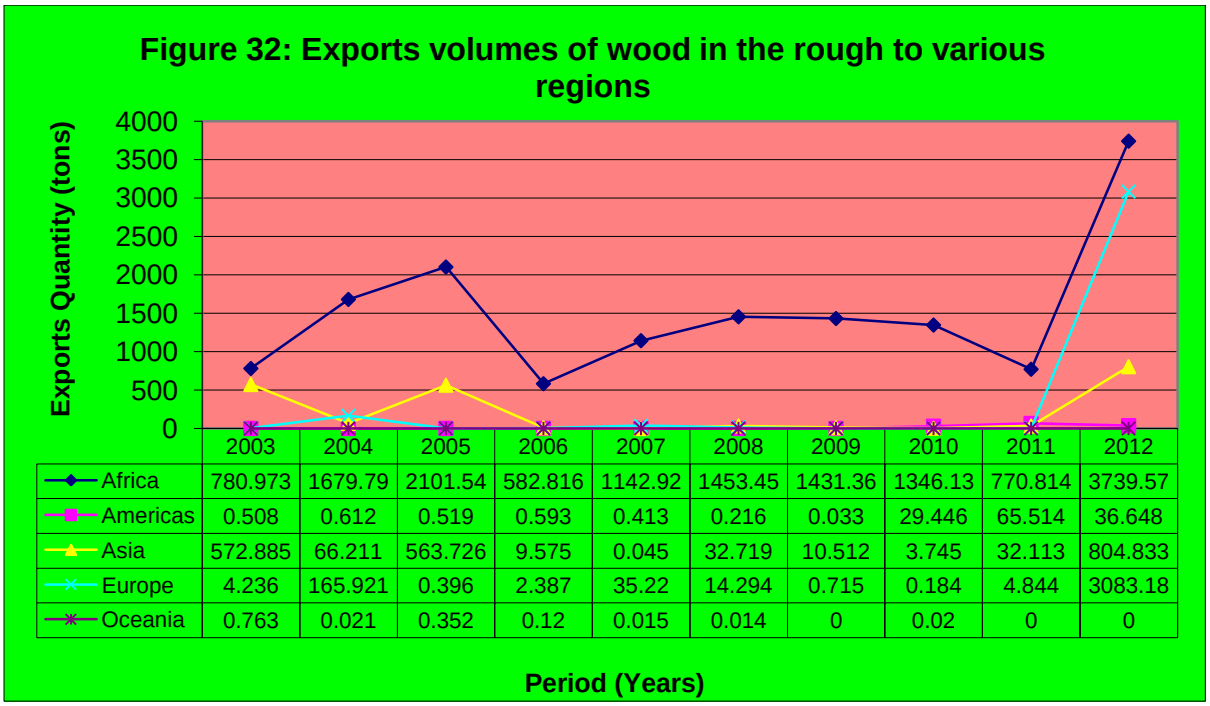


Source: Quantec

Figure 31 indicates exports volumes of wood charcoal (including shell or nut charcoal) from South Africa to Oceania over the past decade. The graph further indicates that during the period under examination, the major export market for wood charcoal from South Africa to Oceania was Australia and New Zealand with no competition from other Oceania regions. The graph further indicates that during the period under review, exports volumes of wood charcoal from South Africa to Australia and New Zealand started to increase in 2003 at approximately 3 tons, and then a dramatic decline occurred of about 2.03 tons in 2005. During the period under observation, exports volumes of wood charcoal from South Africa to Australia and New Zealand attained a peak both in 2006 and in 2008 at export quantities of about 29 and 30 tons respectively. The graph also indicates that exports volumes of wood charcoal from South Africa to Australia and New Zealand saw a dramatic decline in 2007 of up to 12 tons during the same period under review. The graph also indicates that between 2010 and 2012 of the period under scrutiny, there were no exports volumes of wood charcoal from South Africa to Australia and New Zealand. The graph further indicates that there was a decline of 100% in exports volumes of wood charcoal from South Africa to Australia and New Zealand in 2010, 2011 and 2012 as compared to 2009.

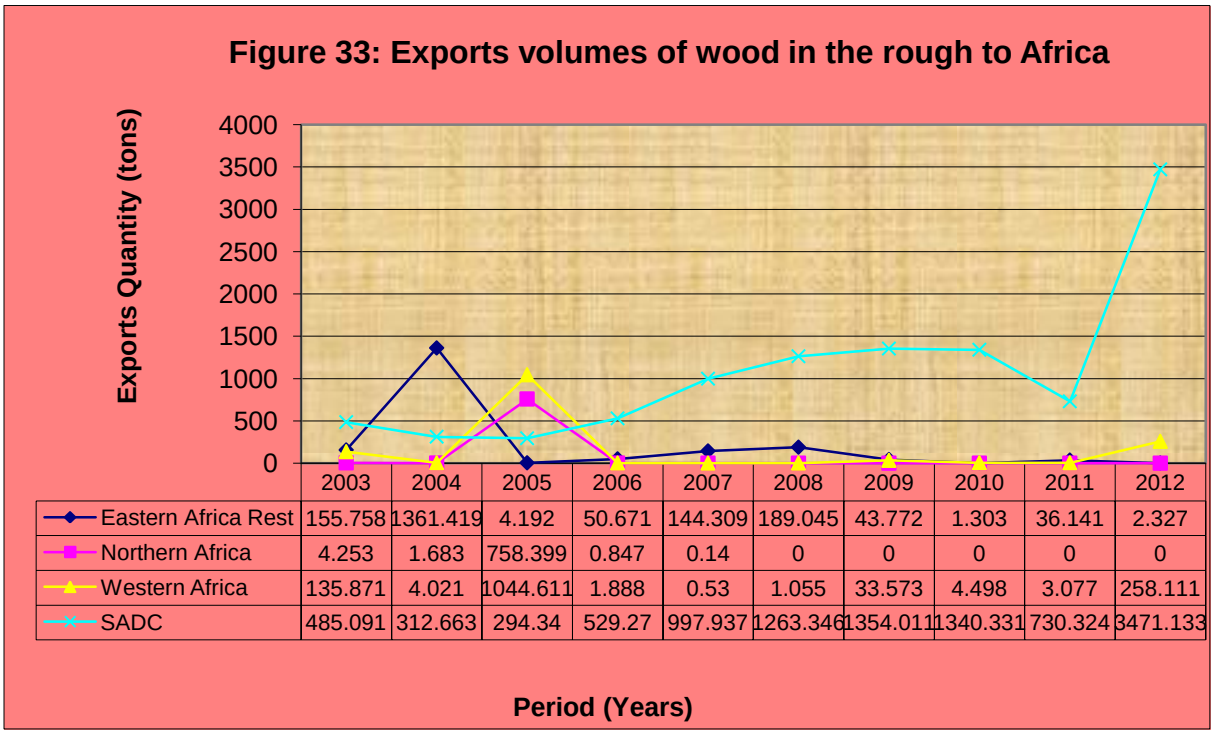
Figure 32 illustrates exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to various regions between 2003 and 2012 period. The figure further illustrates that during the period under examination, exports volumes of wood in the rough from South Africa to the world went to Africa, followed by Europe and Asia with very low volumes going to Americas, and Oceania. The figure also illustrates that during the period under scrutiny, exports volumes of wood in the rough from South Africa to Africa started to increase in 2003 until a small peak was attained in 2005 at approximately 2101 tons. In 2006, exports volumes of wood in the rough experienced a decline at approximately 582 tons. The figure further illustrates that between 2007 2010, exports of wood in the rough from South Africa to Africa increased a compared to 2006 to upper levels of about 1453 tons. The figure also illustrates that in 2011, exports volumes of wood in the rough from South Africa to Africa saw a slight decline of about 770 tons until a peak was attained in 2012 at an export quantity of about 3739 tons. Exports volumes of wood in the rough from South Africa to Europe attained a peak also in 2012 at an

export quantity of about 3083 tons. The figure further illustrates that there was an increase of 385.6% in exports volumes of wood in the rough from South Africa to Africa 2012 as compared to 2009.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	780.973	1679.79	2101.54	582.816	1142.92	1453.45	1431.36	1346.13	770.814	3739.57
Americas	0.508	0.612	0.519	0.593	0.413	0.216	0.033	29.446	65.514	36.648
Asia	572.885	66.211	563.726	9.575	0.045	32.719	10.512	3.745	32.113	804.833
Europe	4.236	165.921	0.396	2.387	35.22	14.294	0.715	0.184	4.844	3083.18
Oceania	0.763	0.021	0.352	0.12	0.015	0.014	0	0.02	0	0

Source: Quantec

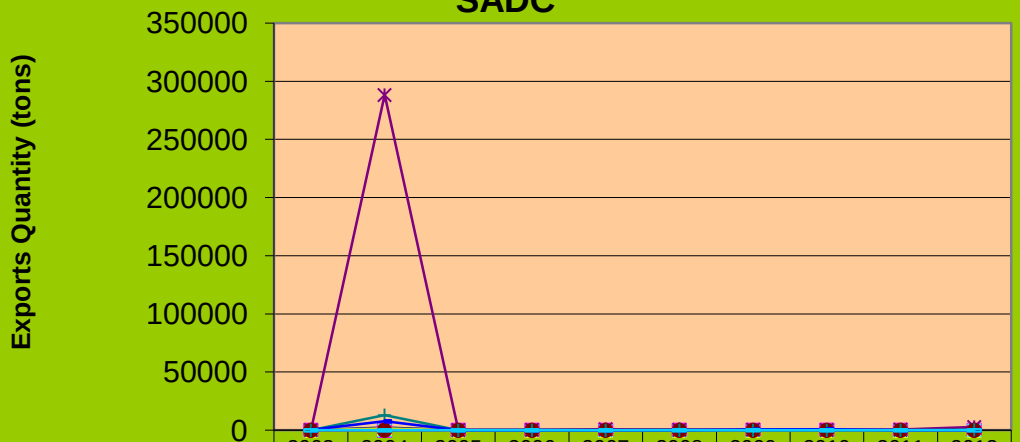


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Africa Rest	155.758	1361.419	4.192	50.671	144.309	189.045	43.772	1.303	36.141	2.327
Northern Africa	4.253	1.683	758.399	0.847	0.14	0	0	0	0	0
Western Africa	135.871	4.021	1044.611	1.888	0.53	1.055	33.573	4.498	3.077	258.111
SADC	485.091	312.663	294.34	529.27	997.937	1263.346	1354.011	1340.331	730.324	3471.133

Source: Quantec

Figure 33 indicates exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to Africa over the past ten years. The figure further indicates that during the period under observation, exports volumes of wood in the rough from South Africa to Africa landed mainly in SADC, followed by low exports volumes of wood in the rough from South Africa to Eastern, Western and Northern Africa. The graph also indicates that during the same period under review, exports volumes of wood in the rough from South Africa to SADC attained a peak in 2012 at an export volumes of approximately 3471 tons, while exports volumes of wood in the rough from South Africa to Eastern Africa attained a peak in 2004 at an export volumes of approximately 1361 tons. During the same period under examination, exports of wood in the rough from South Africa to Western Africa attained a peak in 2005 at an export volumes of about 1044 tons, while exports of wood in the rough from South Africa to Northern Africa attained a peak also in 2005 at an export volumes of approximately 758 tons. The figure further indicates that there was an increase of 375.5% in exports volumes of wood in the rough from South Africa to Eastern Africa 2012 as compared to 2009.

Figure 34: Exports volumes of wood in the rough to SADC



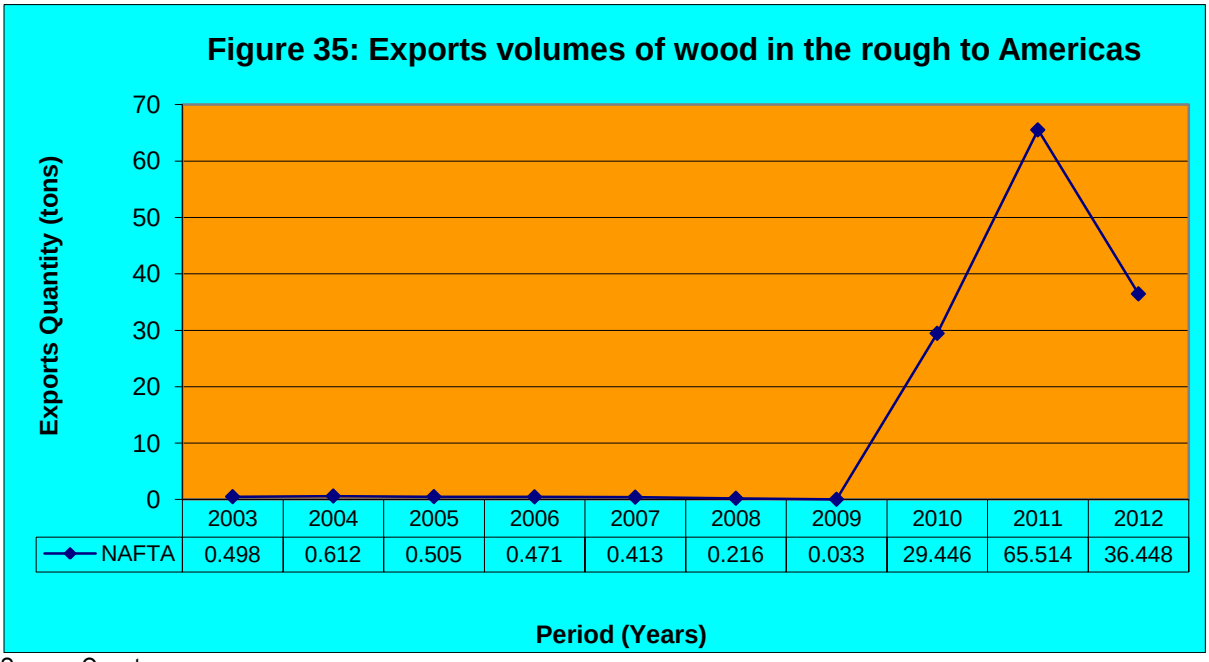
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Angola	2.146	2118	7.859	73.852	2.142	614.258	0.646	0.255	12.992	4.31
Democratic Republic of the Congo	0	60	0.2	2.646	15.232	6.125	22.14	55.406	25.061	33.081
Mauritius	39.662	1380	79.252	68.765	0.6	108.745	5.219	29.838	2.208	43.772
Malawi	1.467	1	0.146	0	0.12	15.24	1.344	0.532	0	0
Mozambique	195.323	288256	206.742	380.251	978.404	378.477	586.137	276.784	581.561	2848.47
Seychelles	0.209	90	0.107	0.748	0.002	0.024	0.156	0.138	7.098	1.299
United Republic of Tanzania	0	13010	0.02	0.98	0	88.39	1.216	45.202	32.617	379.77
Zambia	246.104	7741	0.009	0	0.636	0.547	642.395	914.015	35.524	125.457
Zimbabwe	0.18	0.007	0.005	2.028	0.801	51.54	94.758	18.161	33.263	1.798

Period (Years)

Source: Quantec

Figure 34 indicates exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to SADC over the past decade. The graph further indicates that during the period under observation, exports volumes of wood in the rough from South Africa to SADC landed mainly in Mozambique, followed by very low or intermittent volumes to other SADC countries. The graph also indicates that during the same period under review, exports volumes of wood in the rough from South Africa to Mozambique started to increase in 2004, and at the same time attained a peak at an export

volumes of approximately 288 000 tons, while exports of wood in the rough from South Africa to other SADC countries were below 20 000 tons per annum throughout the period under review. The graph also indicates that, exports volumes of wood in the rough from South Africa to Mozambique saw a dramatic decline between 2005 and 2012 of below 3000 tons per annum.



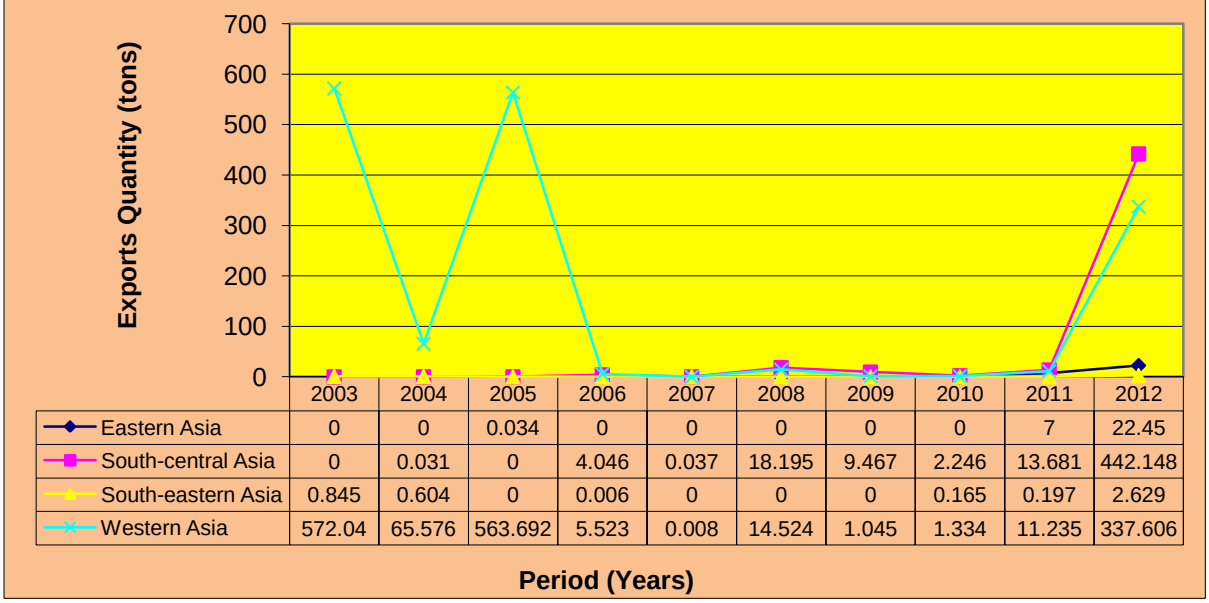
Source: Quantec

Figure 35 depicts exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to Americas over the past decade. The figure further depicts that during the period under observation, NAFTA commanded the greatest market share of wood in the rough exports from South Africa with no competition from other Americas regions. The figure also depicts that exports volume of wood in the rough from South Africa to NAFTA experienced a dramatic decline between 2003 and 2009, until an increase of about 29 tons was experienced and a peak attained in 2011 at an export quantity of about 65.51 tons during the same period under scrutiny. The figure also depicts that in 2012, exports volumes of wood in the rough from South Africa to NAFTA saw a decline in exports volumes of wood in the rough from South Africa to NAFTA of about 36 tons. The decline in exports volumes of wood in the rough from South Africa to NAFTA in 2012 represents 44.6% as compared to 2011.

Figure 36 below shows exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to Asia between 2003 and 2012 period. The graph further shows that during the same period under scrutiny, exports volumes of wood in the rough from South Africa to Asia went to Western Asia, followed by South-central Asia and very minimal volumes of wood in the rough going to Eastern Asia and South-eastern Asia. The graph also shows that during the same period, exports volumes of wood in the rough from South Africa to Western Asia started to increase in 2003 and 2005, and at the same time attained a peak at export volumes of about 563 and 572 tons respectively. The graph also shows that exports volumes of wood in the rough from South Africa to Western Asia experienced a dramatic decline in 2004 to lower levels of about 65 tons during the period under examination. The graph further shows that between 2006 and 2011, exports volumes of wood in the rough were very low

or minimal to levels below 15 tons per annum. The graph also shows that between 2003 and 2004, and again between 2006 and 2010, there were no exports volumes of wood in the rough from South Africa to Western Asia. The graph further shows that in 2012, exports volumes of wood in the rough from South Africa to Western Asia saw a significant increase of about 337 tons which represents 296% as compared to 2011.

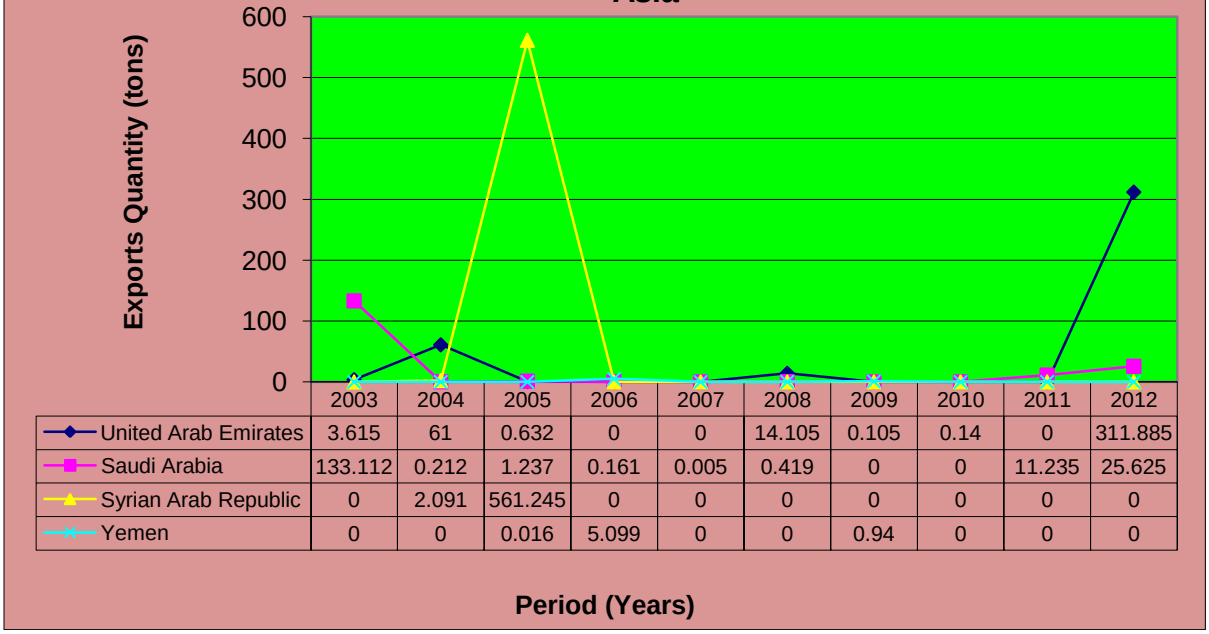
Figure 36: Exports volumes of wood in the rough to Asia



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Asia	0	0	0.034	0	0	0	0	0	7	22.45
South-central Asia	0	0.031	0	4.046	0.037	18.195	9.467	2.246	13.681	442.148
South-eastern Asia	0.845	0.604	0	0.006	0	0	0	0.165	0.197	2.629
Western Asia	572.04	65.576	563.692	5.523	0.008	14.524	1.045	1.334	11.235	337.606

Source: Quantec

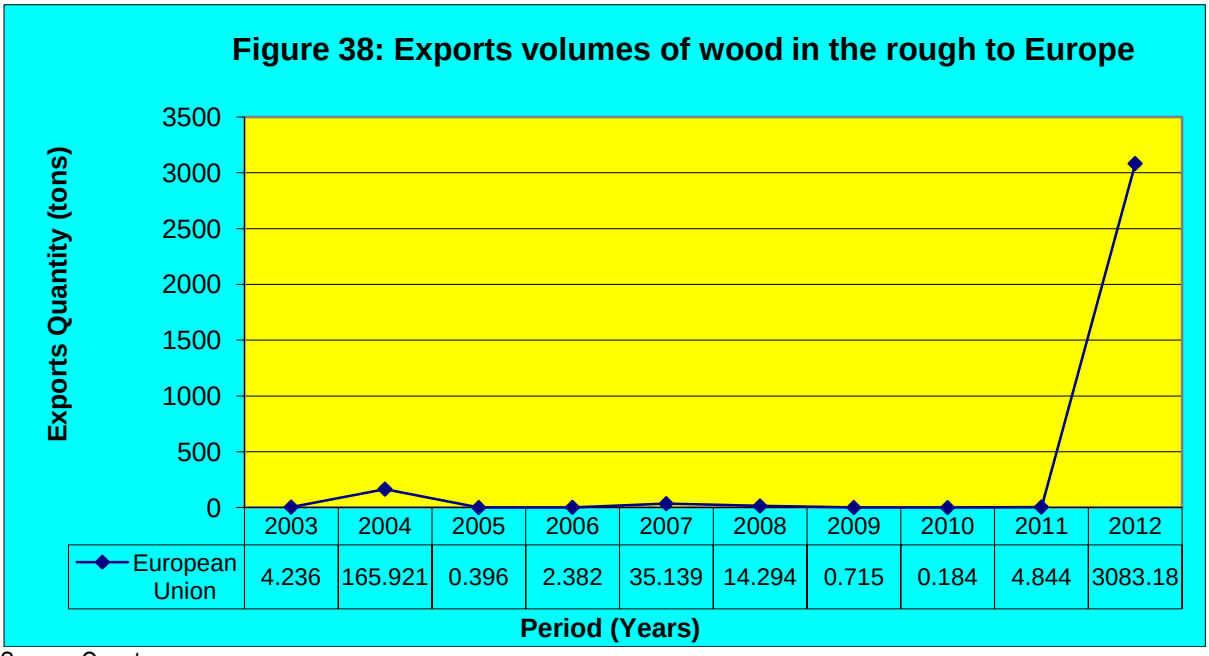
Figure 37: Exports volumes of wood in the rough to Western Asia



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
United Arab Emirates	3.615	61	0.632	0	0	14.105	0.105	0.14	0	311.885
Saudi Arabia	133.112	0.212	1.237	0.161	0.005	0.419	0	0	11.235	25.625
Syrian Arab Republic	0	2.091	561.245	0	0	0	0	0	0	0
Yemen	0	0	0.016	5.099	0	0	0.94	0	0	0

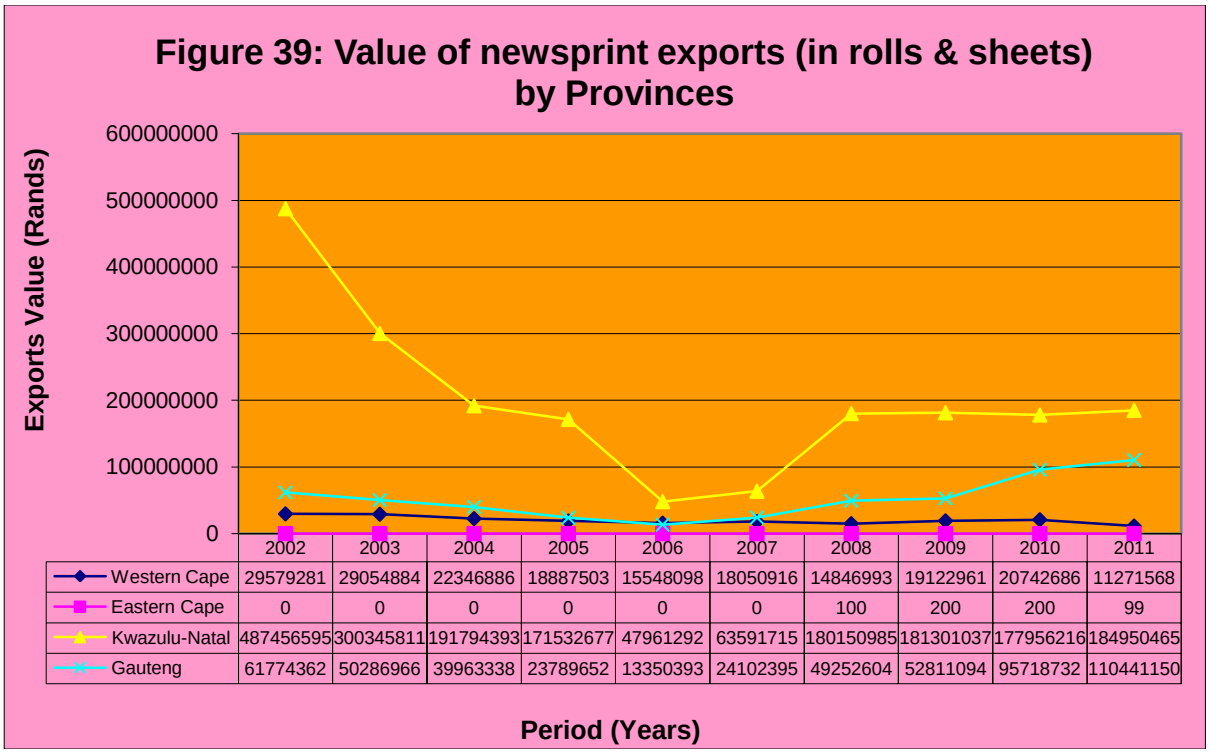
Source: Quantec

Figure 37 shows exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to Western Asia between 2003 and 2012. The graph further shows that during the same period under scrutiny, exports volumes of wood in the rough from South Africa to Asia went to Syrian Arab Republic, followed by United Arab Emirates and very minimal volumes of wood in the rough going to Saudi Arabia and Yemen. The graph also shows that during the same period, exports volumes of wood in the rough from South Africa to Syrian Arab Republic started to increase in 2005 and at the same time attained a peak at an export volume of about 561 tons. The graph also shows that between 2006 and 2012 of the period under examination, there were no exports volumes of wood in the rough from South Africa to Syrian Arab Republic . The graph further shows that exports volumes of wood in the rough from South Africa to United Arab Emirates attained a peak in 2012 at about 311 tons, Saudi Arabia attained a small peak in 2003 at about 133 tons. The decline in exports volumes of wood in the rough from South Africa to Syrian Arab Republic between 2006 and 2012 represents 100% as compared to 2005.



Source: Quantec

Figure 38 illustrates exports volumes of wood in the rough (whether or not stripped of bark) from South Africa to Europe over the past decade. The figure further illustrates that during the same period under scrutiny, exports volumes of wood in the rough from South Africa to Europe landed mainly in European Union. The figure also illustrates that during the same period under observation, exports volumes of wood in the rough from South Africa to European Union started to increase in 2004 at approximately 165 tons, until a peak was attained in 2012 at an export quantity of about 3083 tons. The figure also illustrates that between 2005 and 2011, there were very low or minimal volumes of wood in the rough exports from South Africa to European Union. The figure further illustrates that the increase in exports volumes of wood in the rough from South Africa to European Union represents 64.1% as compared to 2011.

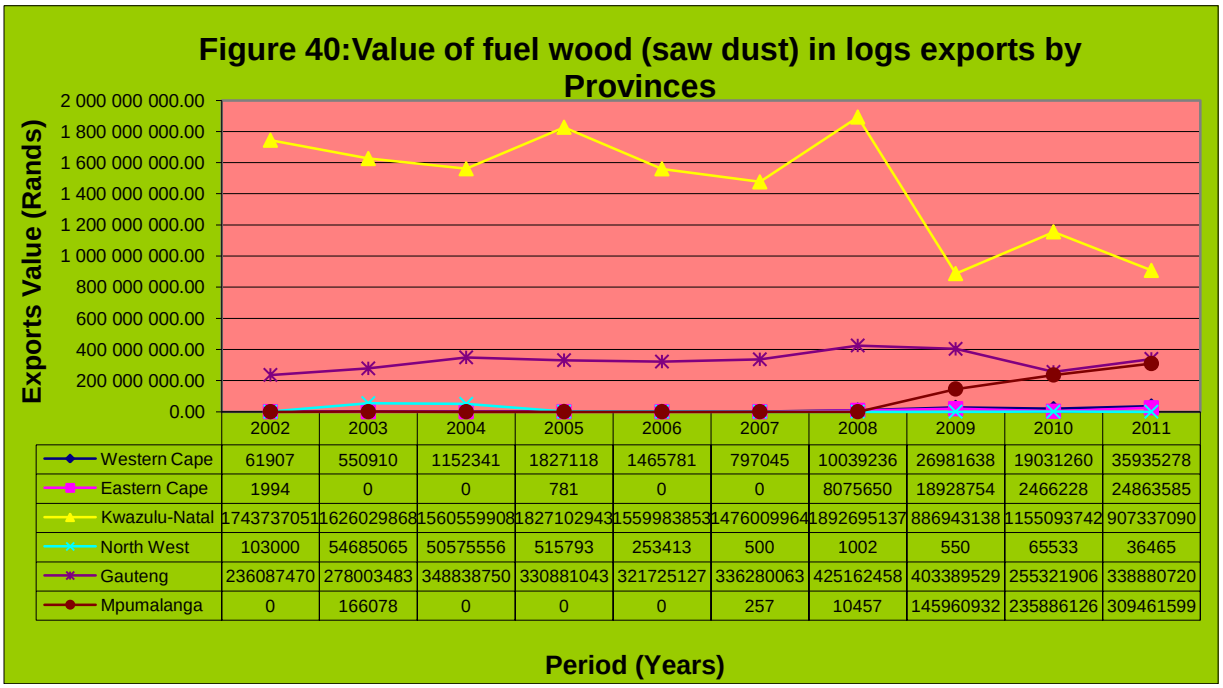


	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Western Cape	29579281	29054884	22346886	18887503	15548098	18050916	14846993	19122961	20742686	11271568
Eastern Cape	0	0	0	0	0	0	100	200	200	99
Kwazulu-Natal	487456595	300345811	191794393	171532677	47961292	63591715	180150985	181301037	177956216	184950465
Gauteng	61774362	50286966	39963338	23789652	13350393	24102395	49252604	52811094	95718732	110441150

Source: Quantec

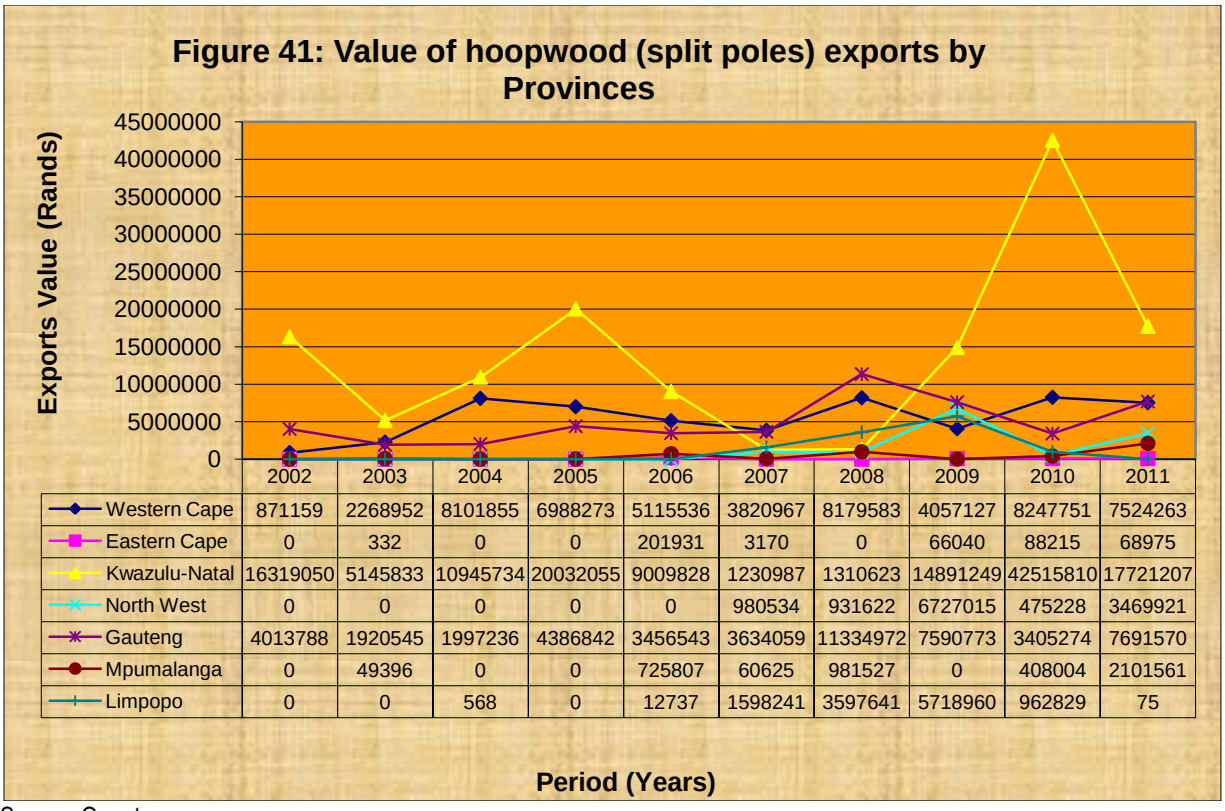
Figure 39 reflects export values of newsprint paper (in rolls and sheets) by Provinces of South Africa to the world between 2002 and 2011 period. The figure further reflects that during the period under review, KwaZulu-Natal Province commanded the greatest market share of newsprint paper exports from South Africa to the world. The figure also reflects that exports value of newsprint paper from South Africa to KwaZulu-Natal started to increase in 2002, and at the same time attained a peak an export value of approximately R487 million. The figure further reflects that between 2003 and 2006, exports value of newsprint paper from KwaZulu-Natal Province to the world experienced a consistent decline to a lower export value of approximately R47 million. The figure further reflects that in 2007, exports values of newsprint paper started to pick-up until higher export values were obtained in 2011 at approximately R184 million. Gauteng Province had very low or intermittent exports values of newsprint paper to the world and attained a peak in 2011 at an export value of about R110 million.

Figure 40 shows exports values of fuel wood (saw dust) in logs by Provinces of South Africa to the world between 2002 and 2011 period. The graph further shows that during the period under review, KwaZulu-Natal province commanded the greatest share of exports of fuel wood or saw dust in logs from South Africa to the world, followed by minimal exports values from Gauteng and Mpumalanga provinces. The graph also shows that during the same period under scrutiny, exports values of fuel wood or saw dust from KwaZulu-Natal were very high between R886 million and R1.89 billion. The graph also shows that exports values of fuel wood from KwaZulu-Natal to the world attained a peak in 2005 and 2008 at export values of approximately R 1.82 and R1.89 billion respectively. In 2009, exports values of fuel wood or saw dust from KwaZulu-Natal province to the world saw a dramatic decline of approximately R886 million, until there was a slight increase in export values in 2010 of about R115 billion. The graph further shows that in 2011, exports values of fuel wood in logs slightly declined to lower levels of up to 907 million.



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Western Cape	61907	550910	1152341	1827118	1465781	797045	10039236	26981638	19031260	35935278
Eastern Cape	1994	0	0	781	0	0	8075650	18928754	2466228	24863585
Kwazulu-Natal	1743737051	1626029868	1560559908	1827102943	1559983853	1476009964	1892695137	886943138	1155093742	907337090
North West	103000	54685065	50575556	515793	253413	500	1002	550	65533	36465
Gauteng	236087470	278003483	348838750	330881043	321725127	336280063	425162458	403389529	255321906	338880720
Mpumalanga	0	166078	0	0	0	257	10457	145960932	235886126	309461599

Source: Quantec



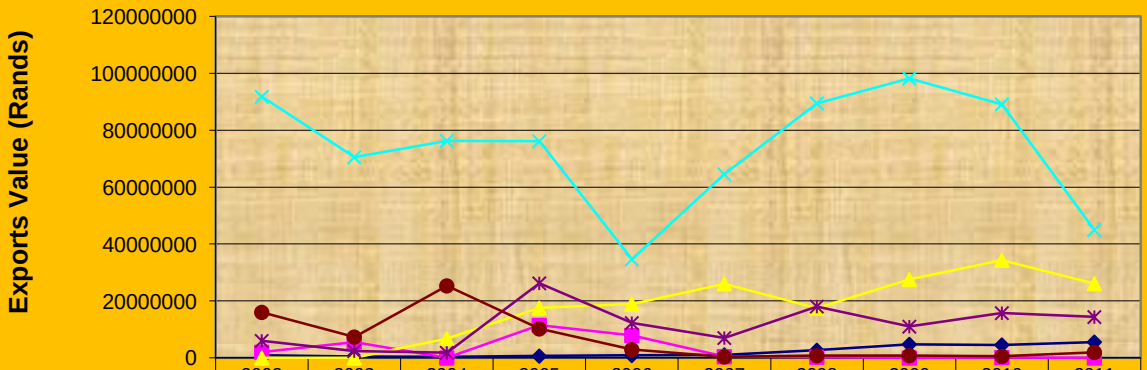
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Western Cape	871159	2268952	8101855	6988273	5115536	3820967	8179583	4057127	8247751	7524263
Eastern Cape	0	332	0	0	201931	3170	0	66040	88215	68975
Kwazulu-Natal	16319050	5145833	10945734	20032055	9009828	1230987	1310623	14891249	42515810	17721207
North West	0	0	0	0	0	980534	931622	6727015	475228	3469921
Gauteng	4013788	1920545	1997236	4386842	3456543	3634059	11334972	7590773	3405274	7691570
Mpumalanga	0	49396	0	0	725807	60625	981527	0	408004	2101561
Limpopo	0	0	568	0	12737	1598241	3597641	5718960	962829	75

Source: Quantec

Figure 41 depicts exports values of hoop wood (split poles) by Provinces from South Africa to the world between 2002 and 2011 period. The graph further depicts that during the period under scrutiny, exports

of hoop wood from KwaZulu-Natal provinces commanded the greatest share of exports from South Africa to the world, followed by Gauteng, Western Cape and North West provinces. The figure also depicts that during the same period under scrutiny, Limpopo, Mpumalanga and Eastern Cape provinces experienced very minimal or low levels of hoop wood exports from South Africa to the world. The graph further depicts that exports values of hoop wood from KwaZulu-Natal to the world started two increases in 2002 at about R16.3 million and then a dramatic increase was experienced in 2005 at R20 million, until a peak was attained in 2010 at an export value of about R42.5 million. The graph also depicts that in 2003, 2007 and 2008of the period under observation, exports values of hoop wood from KwaZulu-Natal province to the world were low at R1.2 million in 2007.

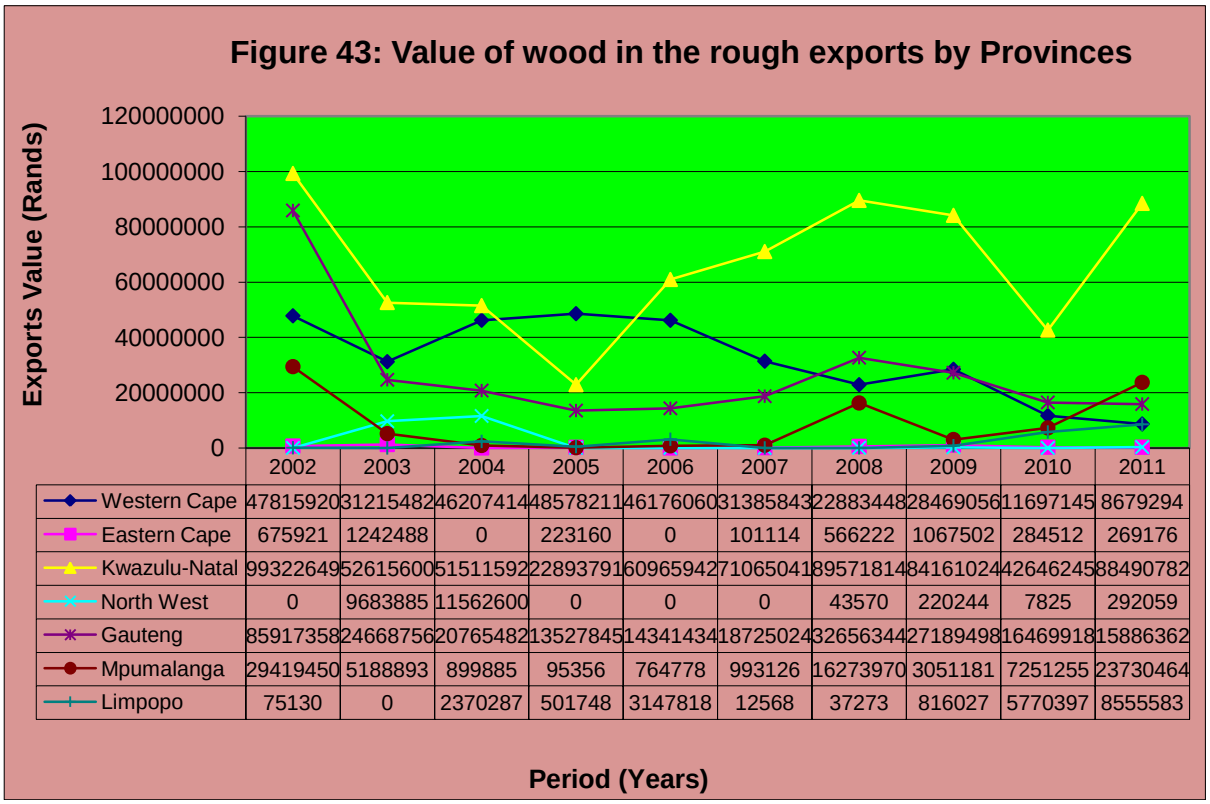
Figure 42: Value of wood charcoal (including shell or nut charcoal) exports by Provinces



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Western Cape	906429	532203	363546	654187	882517	1082473	2723579	4799199	4568141	5568817
Northern Cape	2016091	5516444	0	11467321	7882233	446324	275990	0	145102	0
Free State	0	0	6787159	17515059	18891480	26040954	17488390	27557024	34325025	26092267
Kwazulu-Natal	91758056	70521595	76261068	76127449	34625272	64536992	89452716	98192625	89118918	44965149
Gauteng	6015310	2408124	1835098	26234751	12263465	7016873	18066256	11015637	15758162	14391678
Mpumalanga	16014867	7342153	25326956	10216442	2930921	389888	797018	819739	554269	1945147

Source: Quantec

Figure 42 indicates exports values of wood charcoal (including shell or nut charcoal) by Provinces of South Africa to the world between 2002 and 2011 period. The graph further indicates that during the period under observation, KwaZulu-Natal province commanded the greatest share in exports of wood charcoal from South Africa to the world, followed by minimal exports values from Free State, Gauteng and Mpumalanga provinces. The graph also indicates that during the period under scrutiny, exports values of wood charcoal from KwaZulu-Natal province started to increase in 2001 at an estimated export value of R56 million, until a medium peak was attained in 2002 at an export value of approximately R91 million. The graph further indicates that exports values of wood charcoal from KwaZulu-Natal province to the world attained a peak in 2002 and 2009 at export values of approximately R 91.7 and R98 million respectively. In 2006, exports values of wood charcoal from KwaZulu-Natal province to the world saw a dramatic decline to lower levels of approximately R34 million. The graph further indicates that between 2010 and 2011, exports values of wood charcoal from KwaZulu-Natal province to the world experienced a consistent decline to lower levels of up to R44 million in 2011.



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Western Cape	47815920	31215482	46207414	48578211	46176060	31385843	22883448	28469056	11697145	8679294
Eastern Cape	675921	1242488	0	223160	0	101114	566222	1067502	284512	269176
Kwazulu-Natal	99322649	52615600	51511592	22893791	60965942	71065041	89571814	84161024	42646245	88490782
North West	0	9683885	11562600	0	0	0	43570	220244	7825	292059
Gauteng	85917358	24668756	20765482	13527845	14341434	18725024	32656344	27189498	16469918	15886362
Mpumalanga	29419450	5188893	899885	95356	764778	993126	16273970	3051181	7251255	23730464
Limpopo	75130	0	2370287	501748	3147818	12568	37273	816027	5770397	8555583

Source: Quantec

Figure 43 shows exports values of wood in the rough (whether or not stripped of bark) by Provinces of South Africa to the world between 2002 and 2011 period. The figure further shows that during the period under observation, KwaZulu-Natal province commanded the greatest market share of wood in the rough exports from South Africa to the world, followed by Gauteng and Western Cape provinces. The figure further shows that exports of wood in the rough from KwaZulu-Natal province to the world started to increase in 2002, and at the same time attained a peak at an export value of about R99.3 million, while exports of wood in the rough from Gauteng province to the world attained a peak also in 2002 at an export value of R85.9 million. The figure further shows that exports of wood in the rough from Western Cape Province to the world attained a peak in 2005 at an export value of R48.5 million. The figure also shows that in 2002 and again between 2005 and 2007 of the period under review, there were no exports of wood in the rough from North West province to the world. The figure further shows that provinces such as Eastern Cape, North West, Mpumalanga and Limpopo had very low exports values of wood in the rough of not more than R30 million per annum. The figure further shows that in 2008 and 2011, exports values of wood in the rough saw a surge and a peak at about R88.5 and R89.5 million respectively.

3.2 Share Analysis

Table 3 shows that during the period under examination, KwaZulu-Natal province commanded the greatest share of newsprint paper exports from South Africa to the world.

Table 3: Share Analysis of provincial newsprint paper exports (in rolls and sheets) to the total RSA newsprint paper (in rolls and sheets) exports (%) between 2002 and 2011

Years	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Prov										
WC	5.11	7.65	8.79	8.82	20.2	17.1	6.08	7.55	7.05	3.68
EC	0.00	0.00	0.00	0.00	0.00	0.00	4.09	7.90	6.79	3.23
KZN	84.2	79.1	75.5	80.1	62.4	60.1	73.8	71.6	60.4	60.3
GP	10.7	13.2	15.7	11.1	17.4	22.8	20.2	20.9	32.5	36.0
Total	**100**	**98.9**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source of data: Quantec

Table 4 indicates that KwaZulu-Natal province commanded the greatest share of fuel wood exports from South Africa to the world during the period under observation.

Table 4: Share Analysis of provincial fuel wood (saw dust) in logs exports to the total RSA fuel wood exports (%)

Years	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Prov										
WC	0.00	0.03	0.06	0.08	0.08	0.04	0.43	1.82	1.14	2.22
EC	0.00	0.00	0.00	3.62	0.00	0.00	0.35	1.28	0.15	1.54
KZN	88.1	83.0	79.5	84.6	82.8	81.4	81.0	59.8	69.3	56.1
NW	0.01	2.79	2.58	0.02	0.01	2.76	4.29	3.71	0.00	0.00
GP	11.9	14.2	17.8	15.3	17.1	18.5	18.2	27.2	15.3	21.0
MP	0.00	0.01	0.00	0.00	0.00	1.42	0.00	9.85	14.1	19.1
Total	**100**	**98.9**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source of data: Quantec

Table 5 depicts that during the period under review, KwaZulu-Natal province commanded the greatest share of wood charcoal exports (including shell or nut charcoal) from South Africa to the world.

Table 5: Share Analysis of provincial wood charcoal (including shell and nut charcoal) to the total RSA wood charcoal (including shell and nut charcoal) exports (%)

Years	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011

Prov										
WC	0.78	0.62	0.33	0.46	1.14	1.09	2.11	3.37	3.16	5.99
NC	1.73	6.39	0.00	8.06	10.2	0.05	0.21	0.00	0.10	0.00
FS	0.00	0.00	6.14	12.3	28.4	26.2	13.6	19.4	23.8	28.1
KZN	78.6	81.7	69.0	53.5	44.7	64.9	69.4	69.0	61.7	48.4
GP	5.15	2.79	1.66	18.4	15.8	7.05	14.0	7.74	10.9	15.5
MP	13.7	8.50	22.9	7.18	3.78	0.39	0.62	0.58	0.38	2.09
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source of data: Quantec

Table 6 illustrates that KwaZulu-Natal province commanded the greatest share of hoop wood, split poles exports from South Africa to the world.

Table 6: Share Analysis of provincial hoopwood (split poles) exports to the total RSA hoop wood, split poles exports (%)

Years	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Prov										
Western Cape	4.11	24.2	38.5	22.3	27.6	33.7	31.1	10.4	14.7	19.5
Eastern Cape	0.00	0.00	0.00	0.00	1.09	0.03	0.00	0.17	0.16	0.18
Kwazulu-Natal	77.0	54.8	52.0	63.8	48.6	10.9	4.98	38.1	75.8	45.9
North West	0.00	0.00	0.00	0.00	0.00	8.66	3.54	17.2	0.85	8.99
Gauteng	18.9	20.5	9.49	14.0	18.7	32.1	43.0	19.4	6.07	19.9
Mpumalanga	0.00	0.53	0.00	0.00	3.92	0.54	3.73	0.00	0.73	5.44
Limpopo	0.00	0.00	0.00	0.00	0.07	14.1	13.7	14.6	1.72	0.00
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source of data: Quantec

Table 7 indicates that during the period under scrutiny, KwaZulu-Natal province commanded the greatest share of wood in the rough exports (whether or not stripped of bark) from South Africa to the world.

Table 7: Share Analysis of provincial wood in the rough (whether or not stripped of bark) exports to the total RSA wood in the rough (whether or not stripped of bark) exports (%)

Years	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Prov										
Western Cape	18.2	25.0	34.7	56.6	36.8	25.7	14.1	19.6	13.9	5.95
Eastern Cape	0.26	1.00	0.00	0.26	0.00	0.08	0.35	0.74	0.34	0.18
Kwazulu-Natal	37.7	42.2	38.6	26.7	48.6	58.1	55.3	58.1	50.7	60.7
North West	0.00	7.77	8.67	0.00	0.00	0.00	0.03	0.15	0.01	0.20
Gauteng	32.6	19.8	15.6	15.8	11.4	15.3	20.2	18.8	19.6	10.9
Mpumalanga	11.2	4.16	0.67	0.11	0.61	0.81	10.0	2.10	8.62	16.3

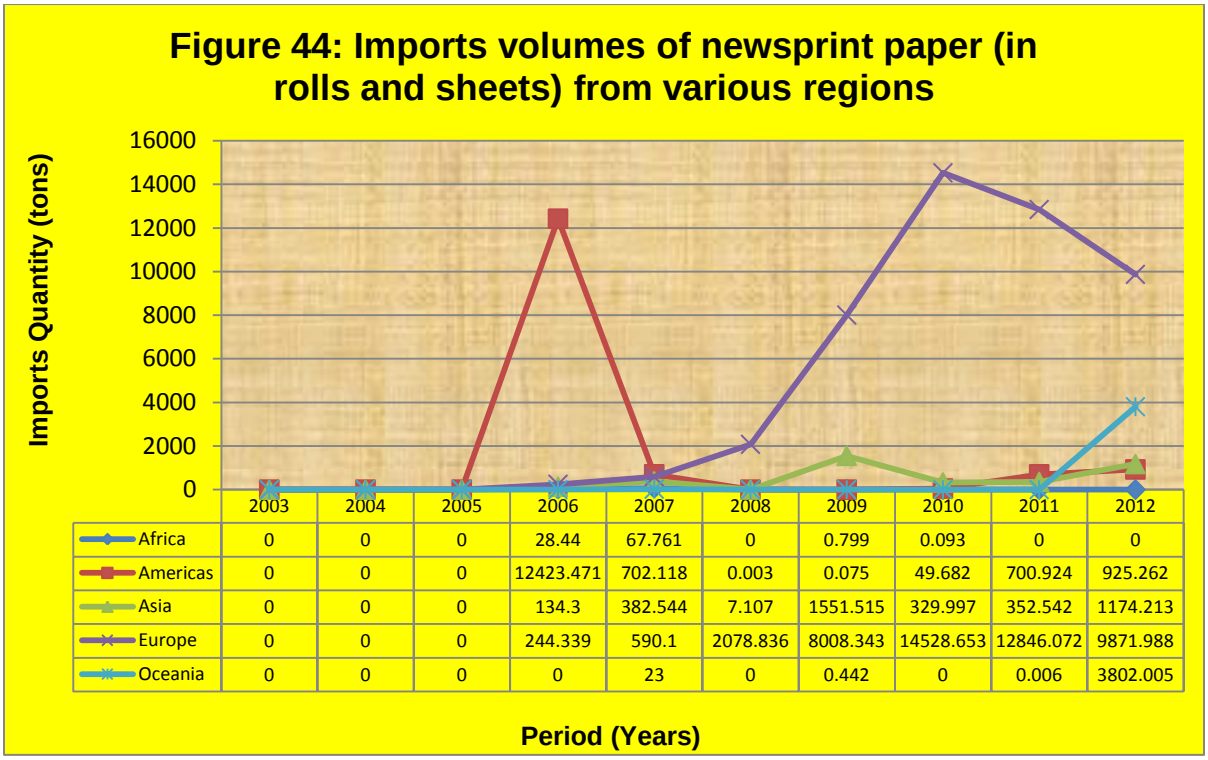
Limpopo	0.03	0.00	1.78	0.58	2.51	0.01	0.02	0.56	6.86	5.86
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source of data: Quantec

3.3 Imports Volumes

Despite persistent economic slow-down in some Western European countries, forest products markets were generally strong in Europe, with greater demand from non-EU 25 countries, even though on smaller volumes.

Figure 44: Imports volumes of newsprint paper (in rolls and sheets) from various regions

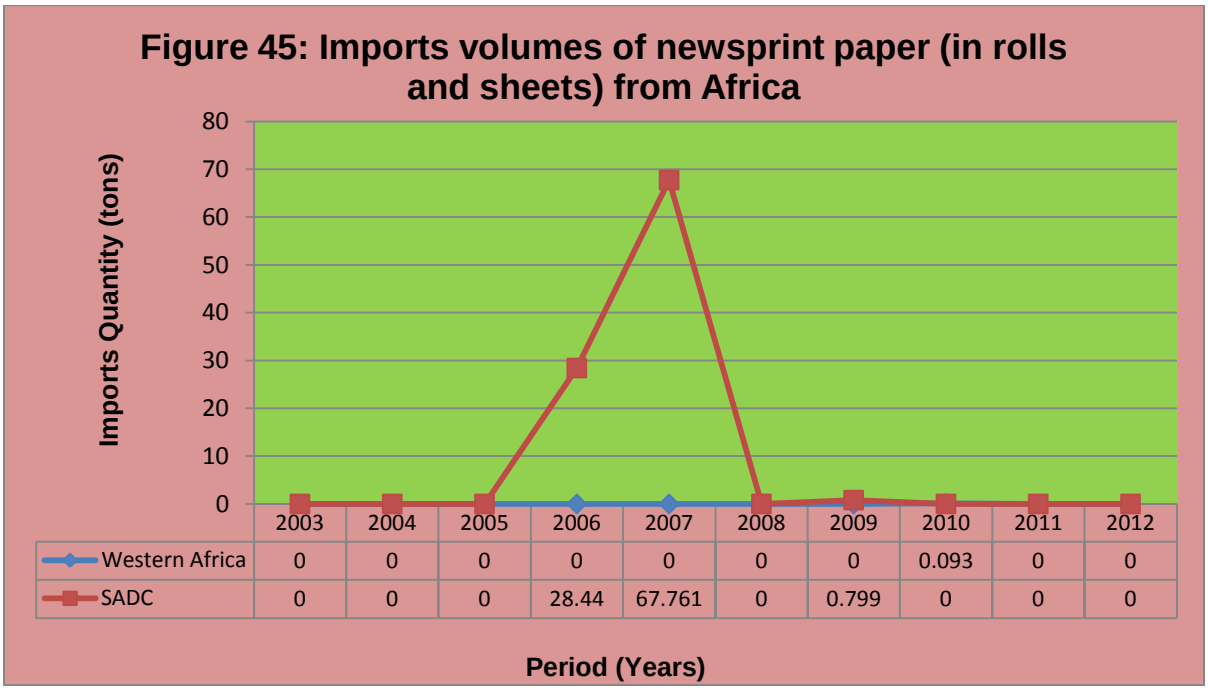


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	0	0	0	28.44	67.761	0	0.799	0.093	0	0
Americas	0	0	0	12423.471	702.118	0.003	0.075	49.682	700.924	925.262
Asia	0	0	0	134.3	382.544	7.107	1551.515	329.997	352.542	1174.213
Europe	0	0	0	244.339	590.1	2078.836	8008.343	14528.653	12846.072	9871.988
Oceania	0	0	0	0	23	0	0.442	0	0.006	3802.005

Source: Quantec

Figure 44 illustrates volumes of newsprint paper imports (in rolls and sheets) from various regions of the world into South Africa between 2003 and 2012. The graph further illustrates that, the major import markets for newsprint paper from various regions into South Africa was Europe, followed by Americas during the period under scrutiny. The figure also illustrates that Asia and Africa experienced very low or minimal levels of supply of newsprint paper imports into South Africa between 2003 and 2012. The graph further illustrates that imports volumes of newsprint paper from Europe started to increase in 2008 until a peak was attained in 2010 at an import quantity of about 14 528.65 tons, while imports of newsprint paper from the Americas started to increase in 2006 and at the same time attained a peak at an import quantity of about 12 423.47 tons. The figure also illustrates that between 2011 and 2012, exports volumes of newsprint paper from Europe into South Africa experienced a consistent decline of about 9 871 tons. The figure further illustrates that between 2002 and 2005 of the period under observation, there were no imports volumes of newsprint paper from the world into South Africa.

The decline in imports volumes of newsprint paper from Europe into South Africa in 2012 represents 23.2% as compared to 2011.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Western Africa	0	0	0	0	0	0	0	0.093	0	0
SADC	0	0	0	28.44	67.761	0	0.799	0	0	0

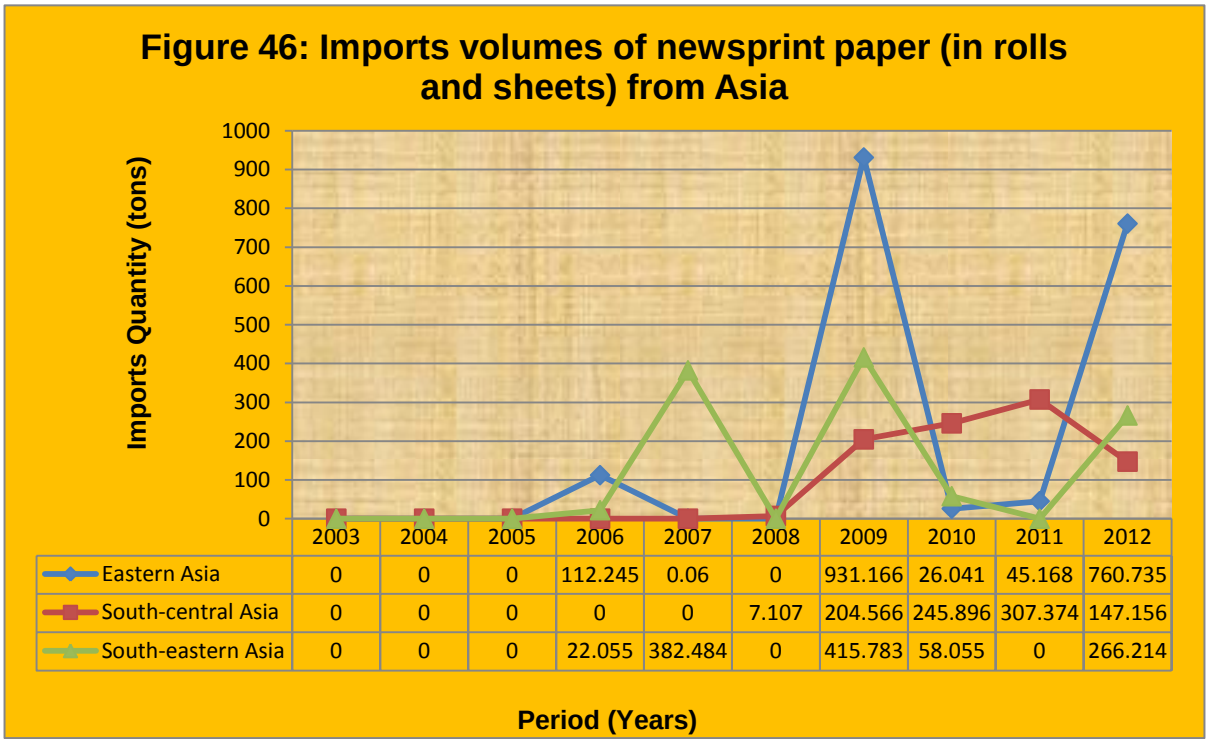
Source: Quantec

Figure 45 depicts imports volumes of newsprint paper (in rolls and sheets) from Africa into South Africa over the past decade. The graph further depicts that, the major import market for newsprint paper from Africa into South Africa was SADC, with no competition from any other African region during the period under examination. The figure also depicts that there were no imports of newsprint paper from SADC into South Africa between 2003 and 2005, and in 2008 and again between 2010 and 2012. The figure also depicts that during the period under review, imports of newsprint paper from SADC into South Africa started to increase in 2006, until a peak was attained in 2007 at an import quantity of about 67.76 tons. The graph further indicates that in 2009, imports of newsprint paper from SADC experienced a decline of approximately 0.80 tons. The decline in imports volumes of newsprint paper from SADC into South Africa in 2010, 2011 and 2012 represents 100% as compared to 2007.

Figure 46 below reflects imports volumes of newsprint paper (in rolls and sheets) from Asia into South Africa between 2003 and 2012. The figure further reflects that Eastern Asia commanded the greatest market share of newsprint paper from Asia into South Africa, followed by South-eastern Asia and South-Central Asia. The graph also reflects that there were no imports volumes of newsprint paper from Asia into South Africa between 2003 and 2005. Imports volumes of newsprint paper from Eastern Asia started to increase in 2006, and then experienced a decline in 2007 and 2008 until a peak was attained in 2009 at an import quantity of about 931.17 tons. Imports volumes of newsprint paper from South-Eastern Asia into South Africa attained a peak in 2007 and in 2009 at an import quantity of about 382.48 and 415.78 tons respectively. In 2010, imports volumes of newsprint paper from Eastern Asia into South Africa saw a decline in imports of about 26 tons, as compared to 931 tons in 2009. In 2011, imports volumes of newsprint paper from Eastern Asia into South Africa slightly increased until a

second peak was attained in 2012 at approximately 760 tons. The increase in imports volumes of newsprint paper from Eastern Asia into South Africa in 2012 represents 58.8% as compared to 2011.

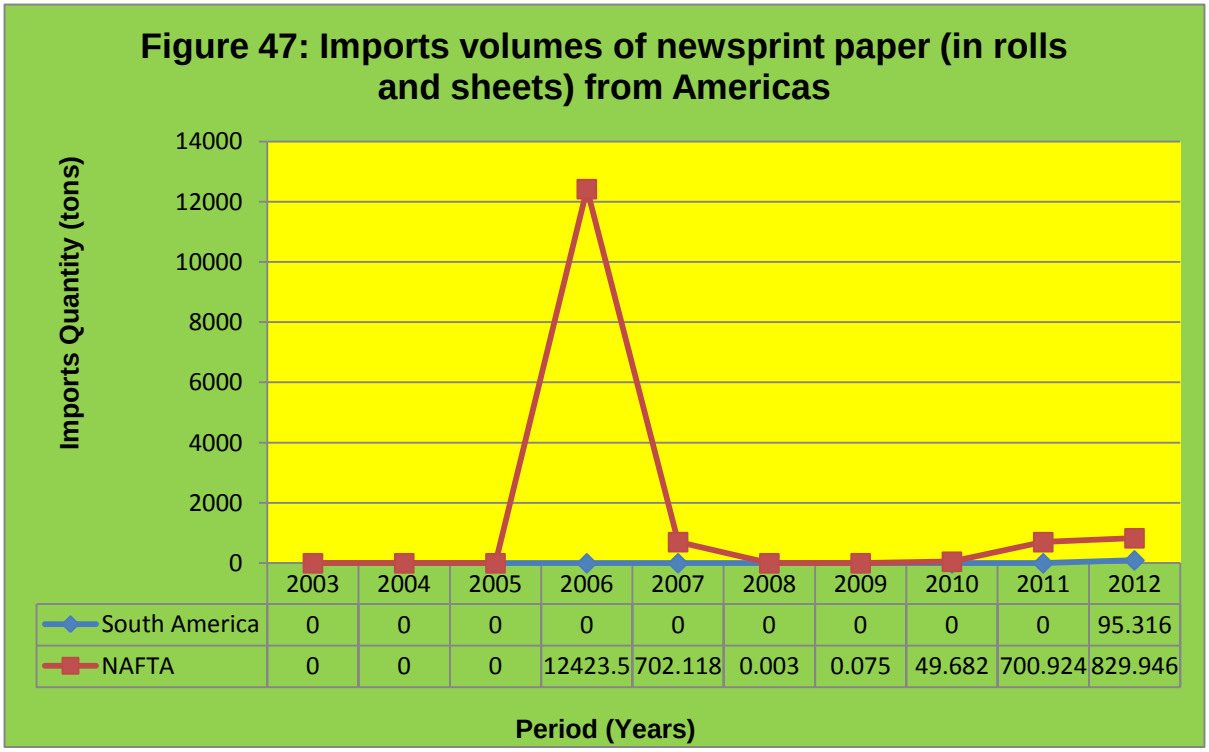
Figure 46: Imports volumes of newsprint paper (in rolls and sheets) from Asia



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Asia	0	0	0	112.245	0.06	0	931.166	26.041	45.168	760.735
South-central Asia	0	0	0	0	0	7.107	204.566	245.896	307.374	147.156
South-eastern Asia	0	0	0	22.055	382.484	0	415.783	58.055	0	266.214

Source: Quantec

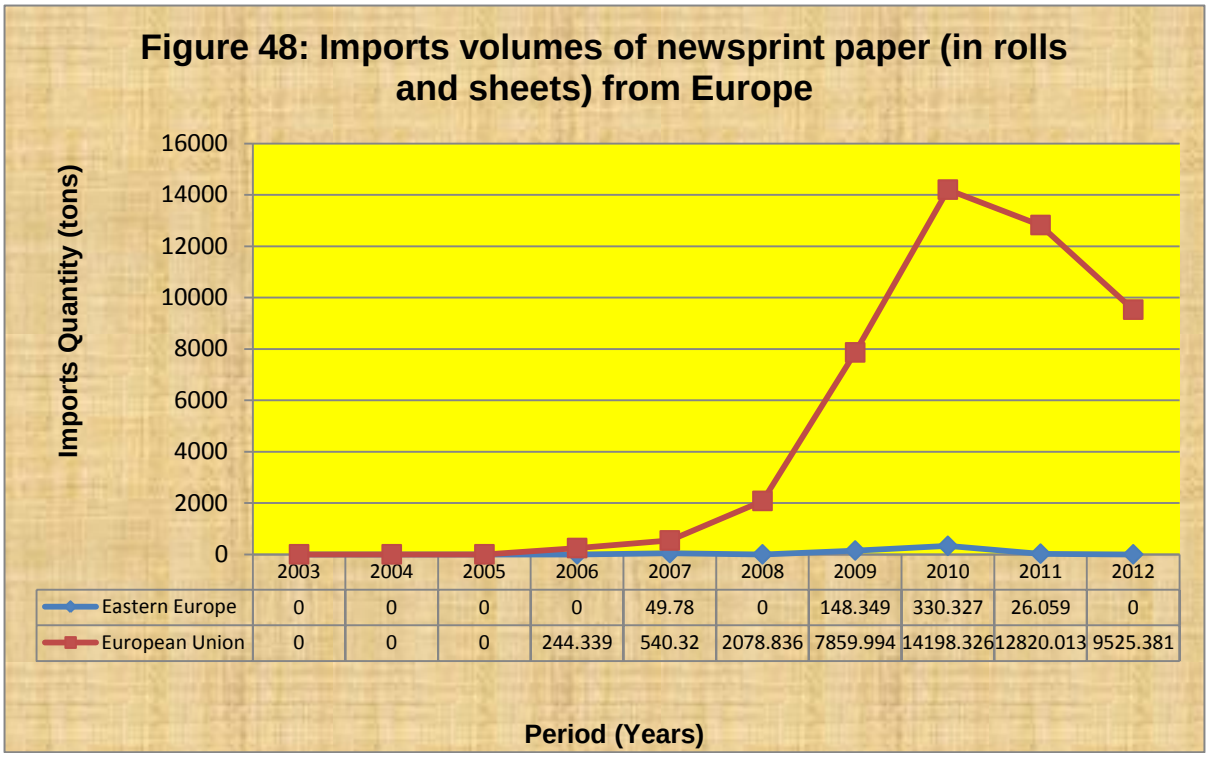
Figure 47: Imports volumes of newsprint paper (in rolls and sheets) from Americas



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
South America	0	0	0	0	0	0	0	0	0	95.316
NAFTA	0	0	0	12423.5	702.118	0.003	0.075	49.682	700.924	829.946

Source: Quantec

Figure 47 reflects imports volumes of newsprint paper (in rolls and sheets) from Americas into South Africa over the past ten years. The figure further reflects that NAFTA commanded the greatest market share of newsprint paper from Americas into South Africa, followed by very low or intermittent imports from South America. The graph also reflects that there were no imports volumes of newsprint paper from Americas into South Africa between 2003 and 2005. Imports volumes of newsprint paper from NAFTA into South Africa started to increase in 2006, and at the same time attained a peak at an import quantity of about 12 423.50 tons. Imports volumes of newsprint paper from NAFTA into South Africa experienced a decline between 2007 and 2012 although there were slight increases between 2011 and 2012 of approximately 700 and 829 tons respectively. The graph further reflects that South Africa only managed to imports volumes of newsprint paper from South America in 2012 at quantities of about 95 tons. The slight increase in imports volumes of newsprint paper from NAFTA into South Africa in 2012 represents 18.4% as compared to 2011.

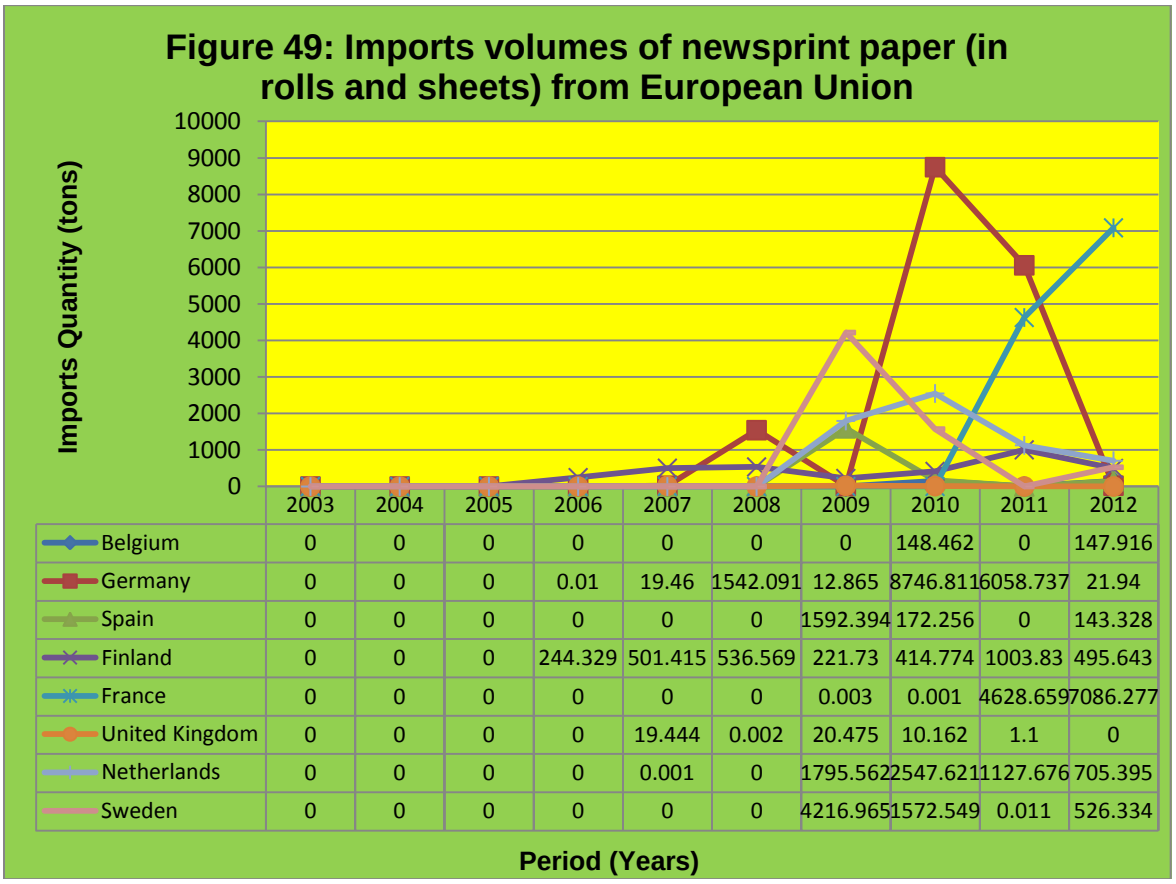


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Europe	0	0	0	0	49.78	0	148.349	330.327	26.059	0
European Union	0	0	0	244.339	540.32	2078.836	7859.994	14198.326	12820.013	9525.381

Source: Quantec

Figure 48 indicates imports of newsprint paper (in rolls and sheets) from Europe into South Africa over the past decade. The graph further indicates that during the period under observation, the major import market for newsprint paper from Europe into South Africa was European Union, followed by very low import volumes of newsprint paper from Eastern Europe. The graph also indicates that there were no imports volumes of newsprint paper from both the European Union and Eastern Europe between 2003 and 2005 of the period under review. The graph further indicates that imports volumes of newsprint paper from the European Union started to increase in 2007 with a consistent increase in 2008 and 2009, until a peak was attained in 2010 at an import volume of approximately 14 198.30 tons. Between 2011 and 2012, there was a consistent decline in imports volumes of newsprint paper from European Union into South Africa of up to 9 525 tons as compared to a peak in 2010 of 14 198 tons.

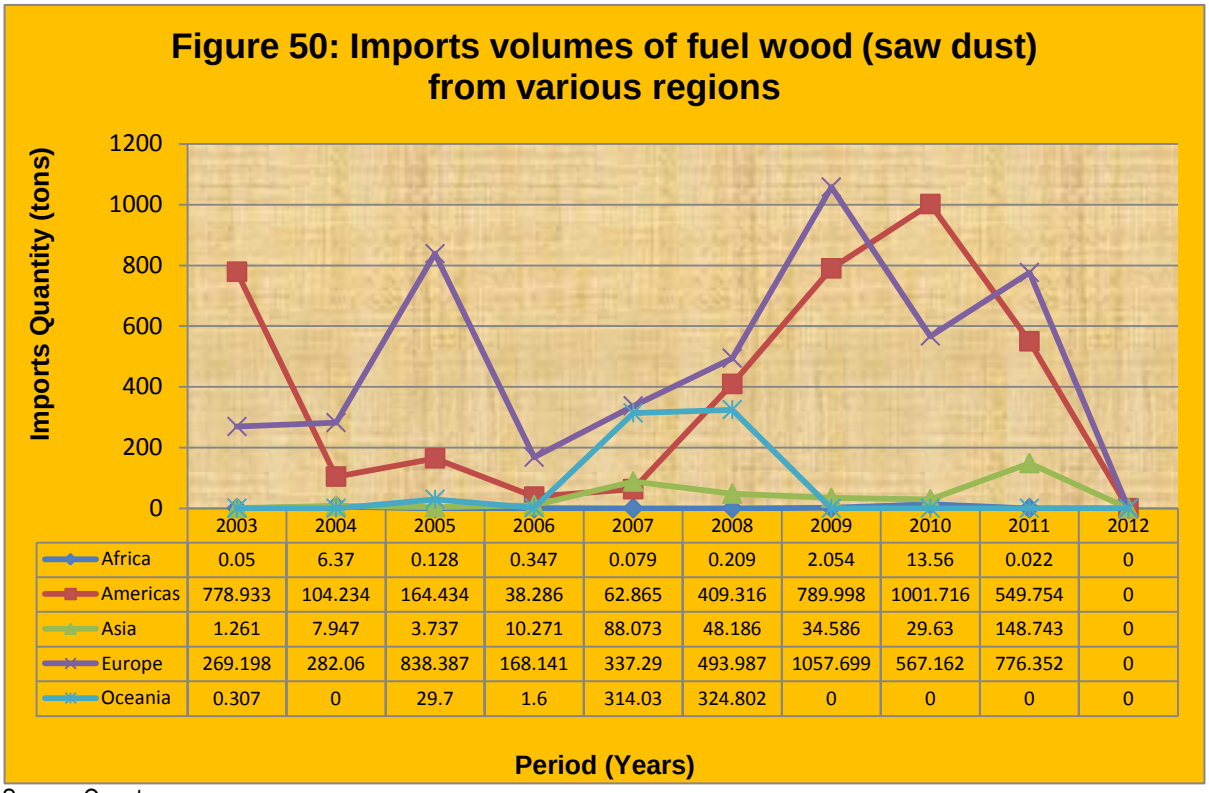
The decline in imports volumes of newsprint paper from European Union into South Africa in 2012 represents 25.7% as compared to 2011.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Belgium	0	0	0	0	0	0	0	148.462	0	147.916
Germany	0	0	0	0.01	19.46	1542.091	12.865	8746.811	6058.737	21.94
Spain	0	0	0	0	0	0	1592.394	172.256	0	143.328
Finland	0	0	0	244.329	501.415	536.569	221.73	414.774	1003.83	495.643
France	0	0	0	0	0	0	0.003	0.001	4628.659	7086.277
United Kingdom	0	0	0	0	19.444	0.002	20.475	10.162	1.1	0
Netherlands	0	0	0	0	0.001	0	1795.562	2547.621	1127.676	705.395
Sweden	0	0	0	0	0	0	4216.965	1572.549	0.011	526.334

Source: Quantec

Figure 49 indicates imports volumes of newsprint paper (in rolls and sheets) from European Union into South Africa between 2003 and 2012. The graph further indicates that during the period under observation, the major import market for newsprint paper from European Union into South Africa was Germany, followed by France and Sweden. The graph also indicates that there were no imports volumes of newsprint paper from the European Union into South Africa between 2003 and 2005 of the period under consideration. The graph further indicates that imports volumes of newsprint paper from the Germany into South Africa started to increase in 2008, and a decline occurred in 2009 to lower levels of about 12 tons. The graph further indicates that imports volumes of newsprint paper from Germany into South Africa attained a peak at an import volume of approximately 8746 tons. Between 2011 and 2012, there was a consistent decline in imports volumes of newsprint paper from Germany into South Africa to lower levels of about 21 tons as compared to 60 tons in 2011. The decline in imports volumes of newsprint paper from Germany into South Africa in 2012 represents 99.7% as compared to 2011.



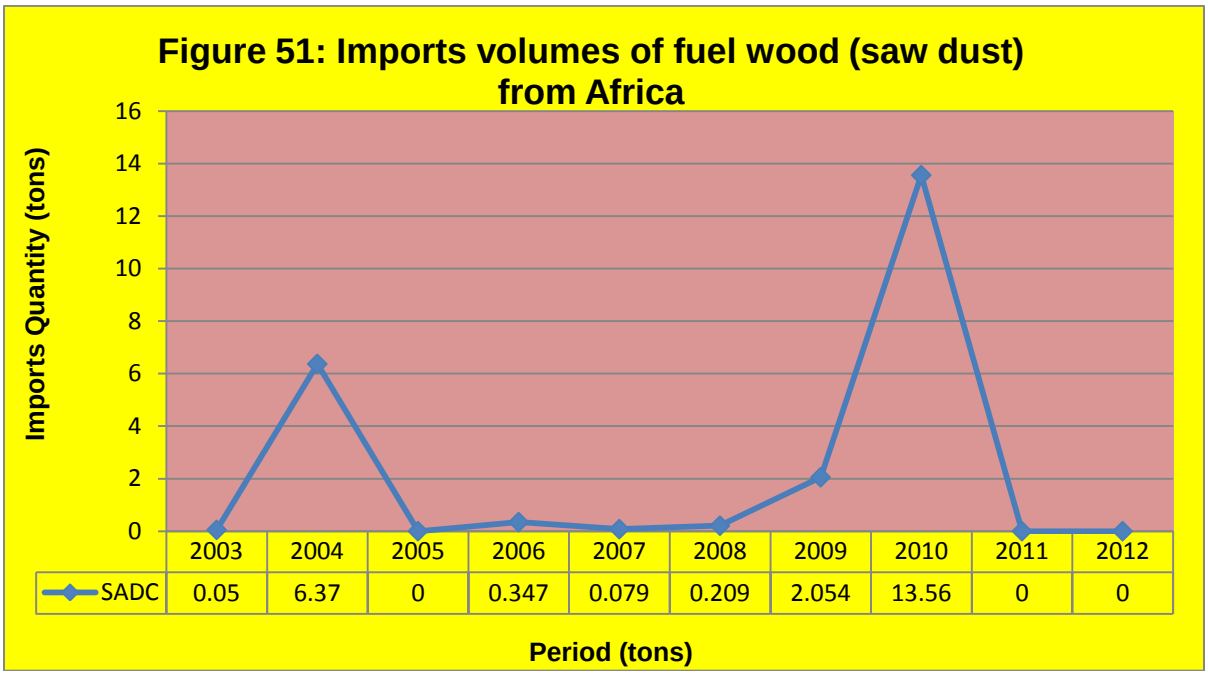
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	0.05	6.37	0.128	0.347	0.079	0.209	2.054	13.56	0.022	0
Americas	778.933	104.234	164.434	38.286	62.865	409.316	789.998	1001.716	549.754	0
Asia	1.261	7.947	3.737	10.271	88.073	48.186	34.586	29.63	148.743	0
Europe	269.198	282.06	838.387	168.141	337.29	493.987	1057.699	567.162	776.352	0
Oceania	0.307	0	29.7	1.6	314.03	324.802	0	0	0	0

Source: Quantec

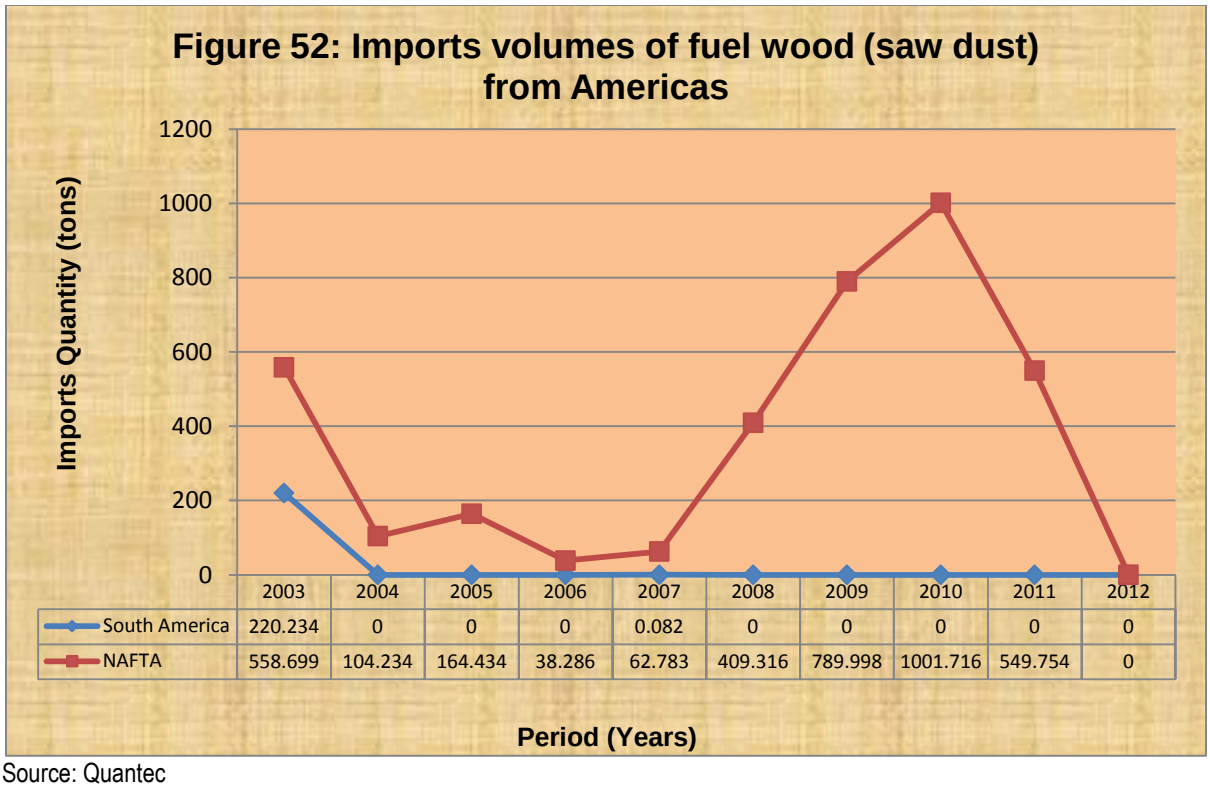
Figure 50 shows imports volumes of fuel wood (saw dust) in logs from various regions into South Africa between 2003 and 2012. The graph further shows that during the period under scrutiny, the major import market for fuel wood from the world was Europe, followed by Americas and very low or intermittent imports volumes from Oceania. The graph also shows that during the period under consideration, imports volumes fuel wood (saw dust) from Africa and Asia into South Africa were not more 150 tons per annum. The figure also shows that imports volumes of fuel wood from Europe into South Africa started to increase in 2005, with a decline in 2006 until there was a notable increase between 2007 and 2008 of about 493 tons. The figure further shows that imports volumes of fuel wood from Europe into South Africa attained a peak in 2009 at an import quantity of about 1057 tons, imports of fuel wood from Americas into South Africa attained a peak in 2010 at about 1001 tons. The figure also shows that in 2010, imports of fuel wood saw a dramatic decline of up to 567 tons, until there were no imports volumes of fuel wood in 2012. The decline in fuel wood imports volumes from Europe into South Africa in 2012 represents 100% as compared to 2011.

Figure 51 depicts imports volumes of fuel wood (saw dust) in logs from Africa into South Africa between 2003 and 2012. The graph further depicts that the major import market for fuel wood from the Africa was SADC, with no competition from other African regions during the period under examination. The figure also depicts that imports of fuel wood from SADC into South Africa started to increase in 2003 until a significant increase was experienced in 2004 at 6 tons. The graph further depicts that between 2005 and 2008, imports of fuel wood from SADC into South Africa experienced a decrease of about 0.02 tons in 2008. The graph also depicts that imports of fuel wood from SADC into South Africa saw a slight increase in 2009 of about 2 tons, until a peak was attained in 2010 at an import quantity of

about 13 tons. The graph further depicts that between 2011 and 2012 of the period under examination, there were no imports of fuel wood from SADC into South Africa. The decline in fuel wood imports volumes from SADC into South Africa in 2011 and 2012 represents 100% as compared to 2010.

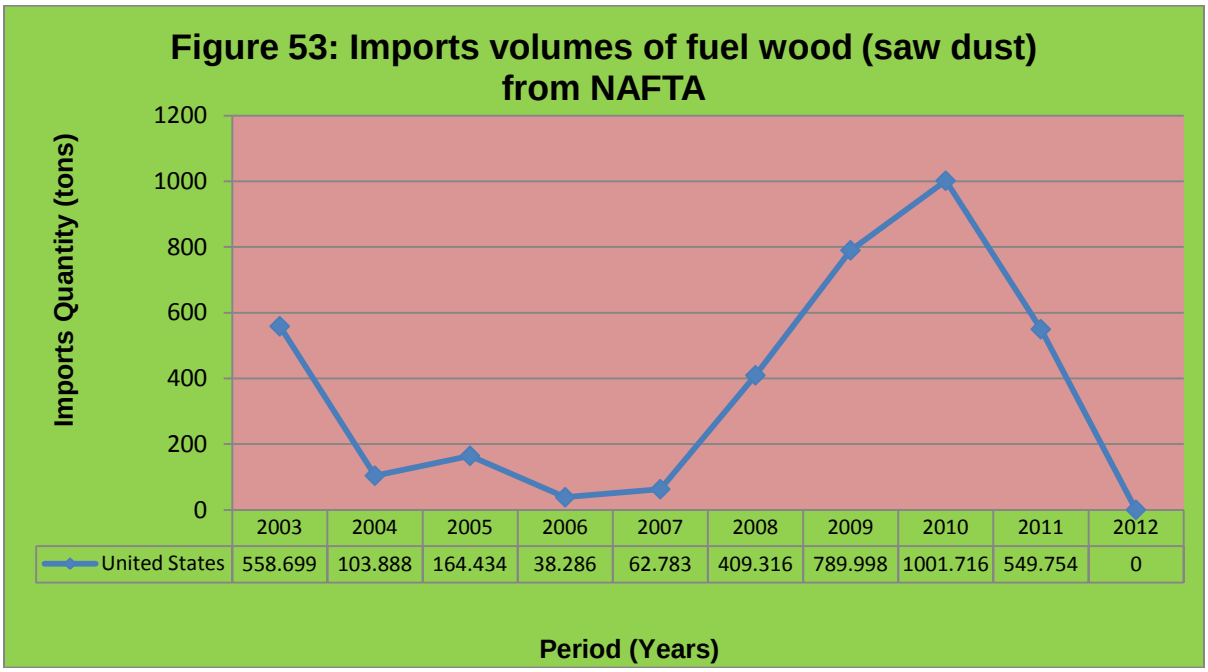


Source: Quantec



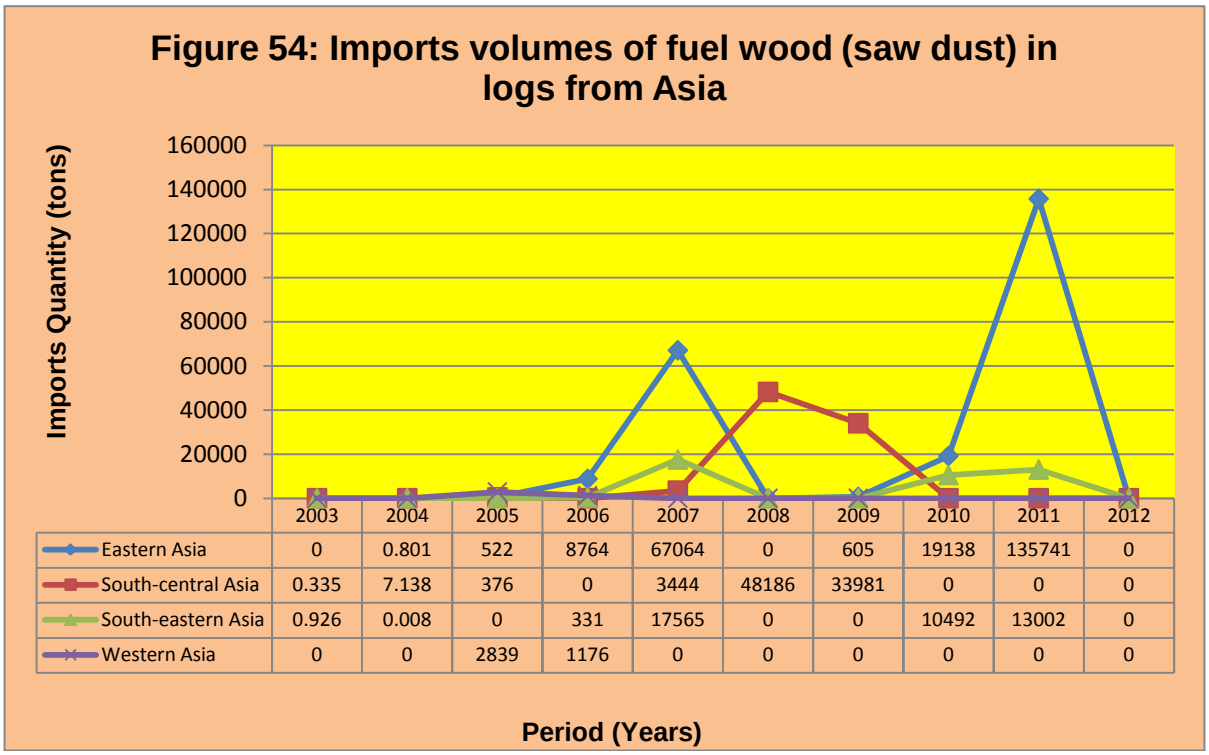
Source: Quantec

Figure 52 illustrates imports volumes of fuel wood (saw dust) in logs from Americas into South Africa over the past ten years. The graph further illustrates that the major import market for fuel wood from the Americas was NAFTA, with very low competition from other Americas regions during the period under examination. The figure also illustrates that imports of fuel wood from NAFTA into South Africa started to increase in 2003, and then a decline occurred from 2004 to 2007 at approximately 0.08 tons. The graph further illustrates that imports of fuel wood (saw dust) from NAFTA into South Africa experienced an increase between 2008 and 2009, until a peak was attained in 2010 at an import quantity of about 1001.72 tons. In 2011 of the same period under review, imports of fuel wood from NAFTA into South Africa saw a slight decline in imports of fuel wood of approximately 549 tons with no imports volumes of fuel wood in 2012. The decline in fuel wood imports volumes from NAFTA into South Africa in 2012 represents 100% as compared to 2011.



Source: Quantec

Figure 53 indicates imports volumes of fuel wood (saw dust) in logs from NAFTA into South Africa between 2003 and 2012. The figure further indicates that the major import market for fuel wood from NAFTA into South Africa was United States, with no competition from other NAFTA countries during the period under observation. The figure also indicates that imports volumes of fuel wood from United States into South Africa started to increase in 2003, and then experienced a decline from 2004 to 2007 at approximately 38 tons. The figure also indicates that imports volumes of fuel wood from the United States into South Africa experienced an increase between 2008 and 2009 of about 789 tons, until a peak was attained in 2010 at an import quantity of about 1001.72 tons. In 2011 of the period under examination, imports volumes of fuel wood from the United States into South Africa experienced a dramatic decline in imports volumes of fuel wood of up to 549 tons, with no imports volumes of fuel wood (saw dust) in 2012. The decline in fuel wood imports volumes from United States into South Africa in 2012 represents 100% as compared to 2011.



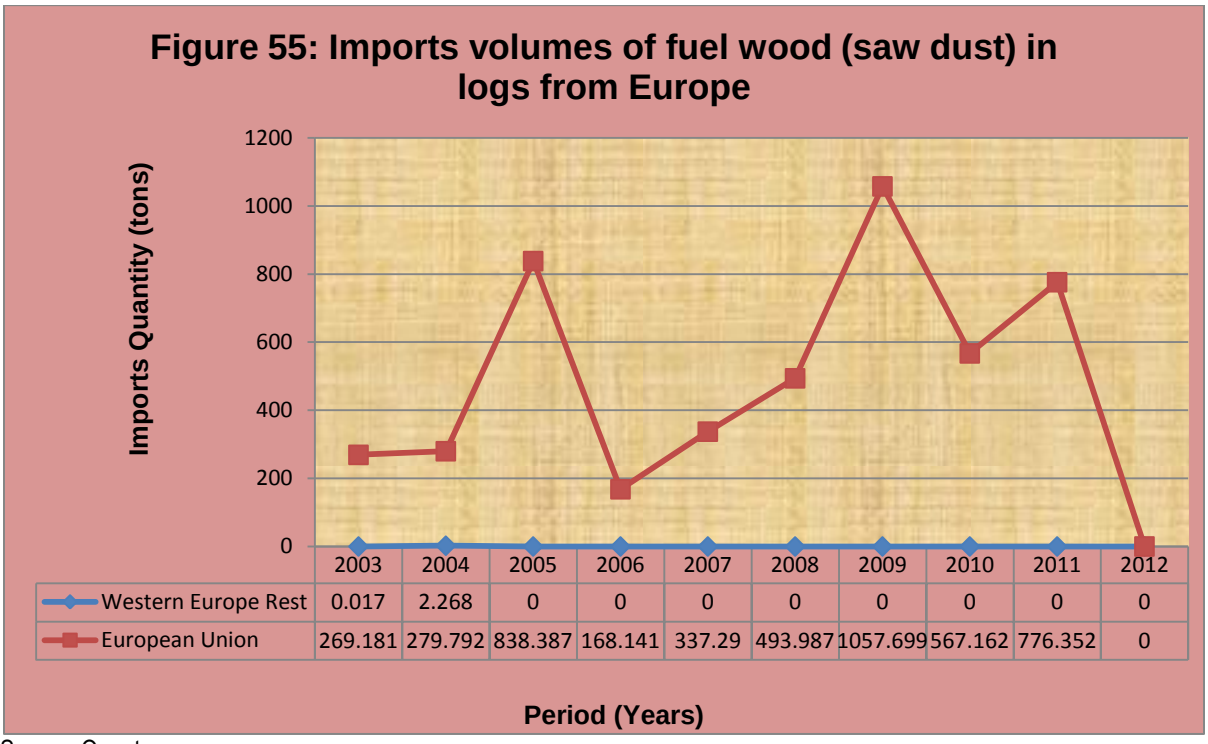
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Asia	0	0.801	522	8764	67064	0	605	19138	135741	0
South-central Asia	0.335	7.138	376	0	3444	48186	33981	0	0	0
South-eastern Asia	0.926	0.008	0	331	17565	0	0	10492	13002	0
Western Asia	0	0	2839	1176	0	0	0	0	0	0

Source: Quantec

Figure 54 shows imports volumes of fuel wood (saw dust) in logs from Asia into South Africa between 2003 and 2012. The figure further shows that the major import market for fuel wood from the Asia was Eastern Asia followed by South-central Asia with very low imports volumes of fuel wood from South-eastern Asia and Western Asia during the period under examination. The figure also depicts that imports volumes of fuel wood from Eastern Asia into South Africa started to increase in 2006 to 2007 at imports volumes of about 67 064 tons. Between 2008 and 2009, there was a decrease of about 605 tons as compared to 2007. Imports of fuel wood from Eastern Asia into South Africa experienced an increase in 2010, until a peak was attained in 2011 at an import quantity of about 135 741 tons. During 2012 of the period under scrutiny, the figure shows that there were no imports volumes of fuel wood from Eastern Asia into South Africa saw a slight decline in imports of fuel wood of approximately 30.29 tons. The decline in fuel wood imports volumes from Eastern Asia into South Africa in 2012 represents 100% as compared to 2011.

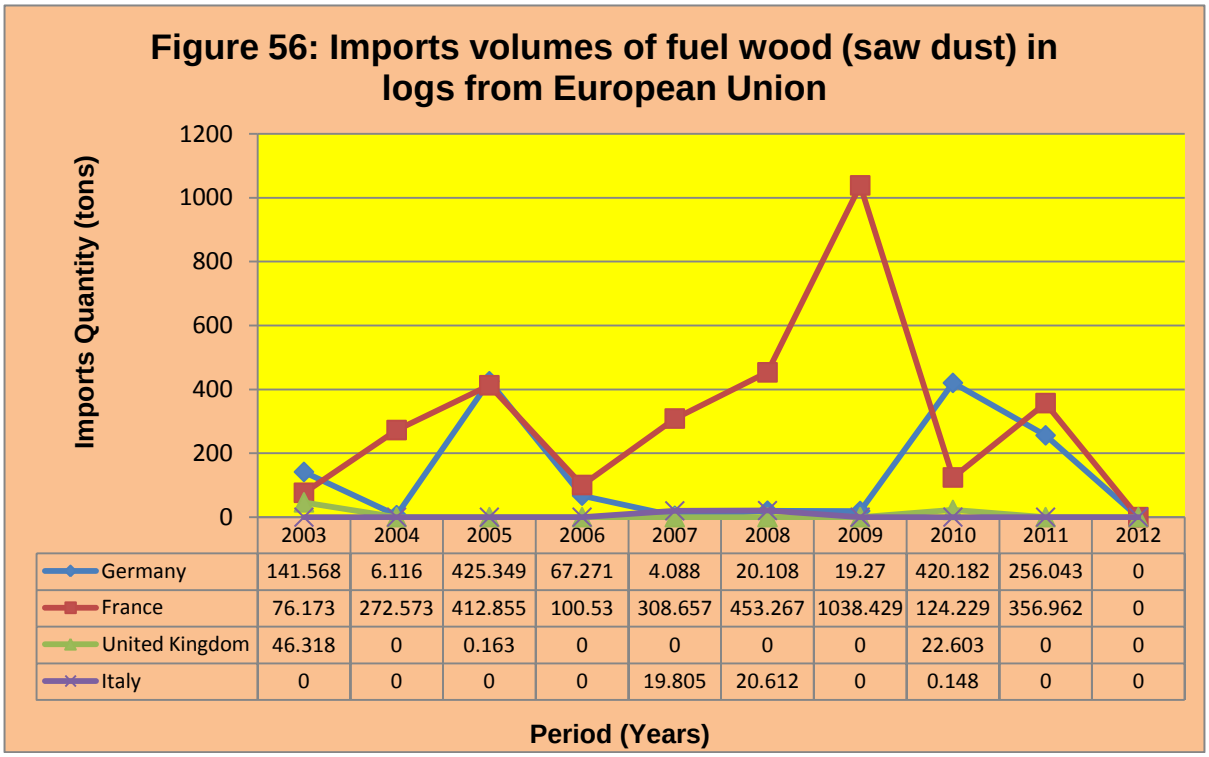
Figure 55 shows imports volumes of fuel wood (saw dust) in logs from Europe into South Africa between 2003 and 2012 period. The graph further shows that during the period under observation, the major supplying market for fuel wood from Europe into South Africa was European Union. Imports volumes of fuel wood from the European Union into South Africa started to increase in 2005 at about 838 tons, and then experienced a decline in 2006 to lower levels of about 168 tons. In 2007 and 2008, imports of fuel wood from the European Union into South Africa saw a consistent increase until a peak was attained in 2009 at an import quantity of approximately 1057 tons. The graph further shows that in 2010, imports volumes of fuel wood from European Union into South Africa saw a slight decline of about 567 tons. The graph also shows that in 2011, imports volumes of fuel wood (saw dust) from European Union into South Africa experienced a slight increase of approximately 776 tons, until there were no imports volumes of fuel wood from European Union into South Africa in 2012. The decline in

imports volumes of fuel wood from European Union into South Africa in 2012 represents 100% as compared to 2011.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Western Europe Rest	0.017	2.268	0	0	0	0	0	0	0	0
European Union	269.181	279.792	838.387	168.141	337.29	493.987	1057.699	567.162	776.352	0

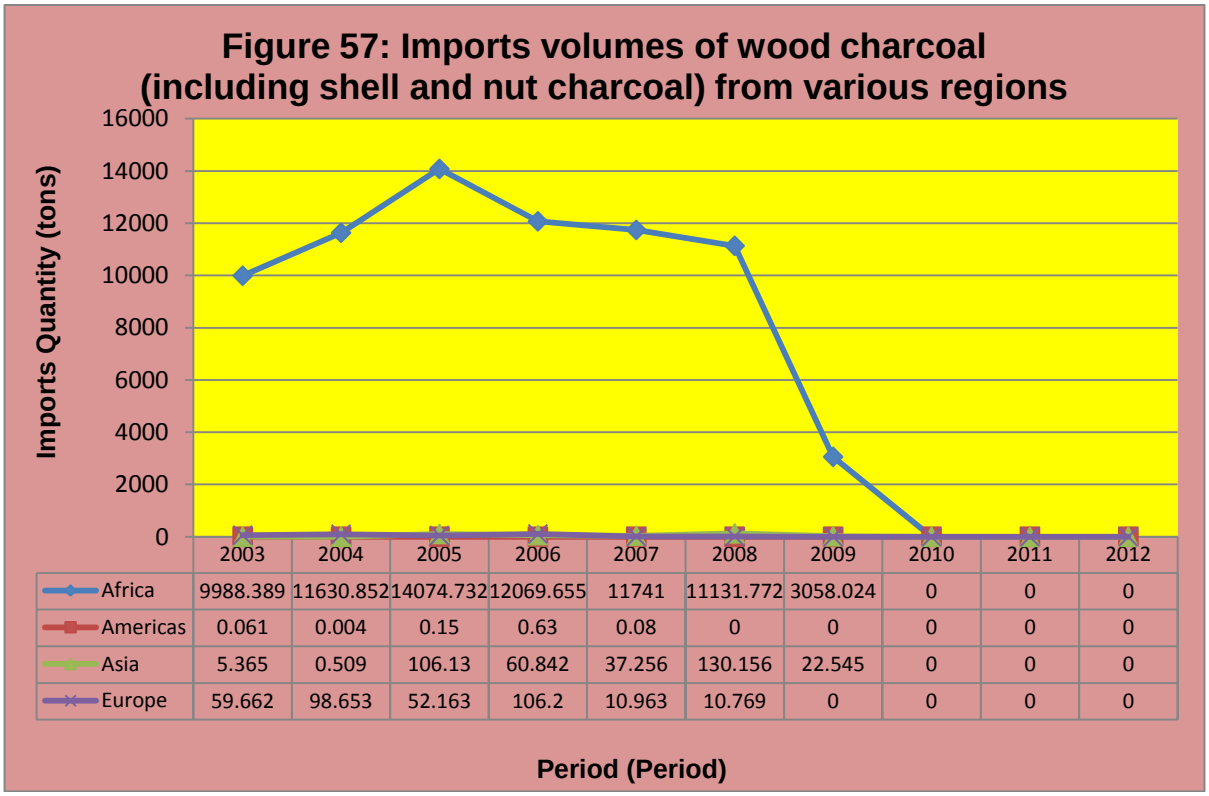
Source: Quantec



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Germany	141.568	6.116	425.349	67.271	4.088	20.108	19.27	420.182	256.043	0
France	76.173	272.573	412.855	100.53	308.657	453.267	1038.429	124.229	356.962	0
United Kingdom	46.318	0	0.163	0	0	0	0	22.603	0	0
Italy	0	0	0	0	19.805	20.612	0	0.148	0	0

Source: Quantec

Figure 56 indicates imports volumes of fuel wood (saw dust) in logs from European Union into South Africa over the past decade. The figure further indicates that during the period under observation, the major supplying market for fuel wood from European Union into South Africa was France, followed by Germany. The figure also indicates that imports volumes of fuel wood from France into South Africa attained a peak in 2009 at an import quantity of approximately 1038 tons, while imports volumes of fuel wood from Germany into South Africa attained a peak also in 2005 at an import volumes of approximately 425 tons during the period under examination. The figure further indicates that imports volumes of fuel wood from France into South Africa saw a decline in 2003, followed by 2006 and 2010 at approximately 76, 100 and 124 tons respectively. The figure further indicates that imports volumes of fuel wood from Germany into South Africa saw a decline in 2004, and between 2007 and 2009 at about 6, 4, 20 and 19 tons respectively. The figure further indicates that over the past ten years, there were low imports volumes of fuel wood from United Kingdom and Italy into South Africa of up to levels of 0.15 tons. The decline in imports volumes of fuel wood from France into South Africa in 2012 represents 100% as compared to 2011.

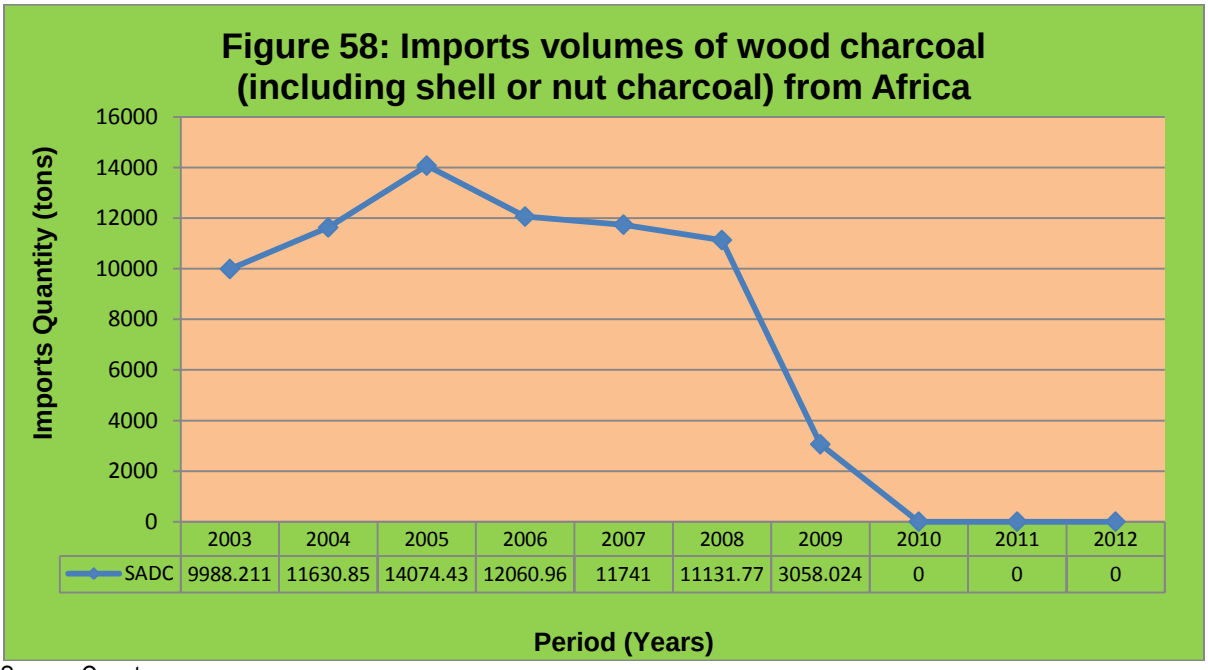


	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Africa	9988.389	11630.852	14074.732	12069.655	11741	11131.772	3058.024	0	0	0
Americas	0.061	0.004	0.15	0.63	0.08	0	0	0	0	0
Asia	5.365	0.509	106.13	60.842	37.256	130.156	22.545	0	0	0
Europe	59.662	98.653	52.163	106.2	10.963	10.769	0	0	0	0

Source: Quantec

Figure 57 reflects imports volumes of wood charcoal (including shell or nut charcoal) from various regions of the world into South Africa between 2003 and 2012. The figure further reflects that during the period under scrutiny, Africa was the main supplier of wood charcoal into South Africa, with very low or intermittent volumes from Americas, Asia and Europe. The figure also reflects that imports volumes of wood charcoal from Africa into South Africa started to increase in 2003, with a consistent increase in 2004 until a peak was attained in 2005 at an import quantity of about 14074 tons. The figure further reflects that between 2006 and 2012, imports volumes of wood charcoal from Africa into South Africa experienced a consistent decline up to lower levels of 3058 tons in 2009. The figure further

reflects that between 2010 and 2012 of the same period under scrutiny, there were no imports volumes of wood charcoal from various regions of the world into South Africa. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from Africa into South Africa between 2010 and 2012 represents 100% as compared to 2009.

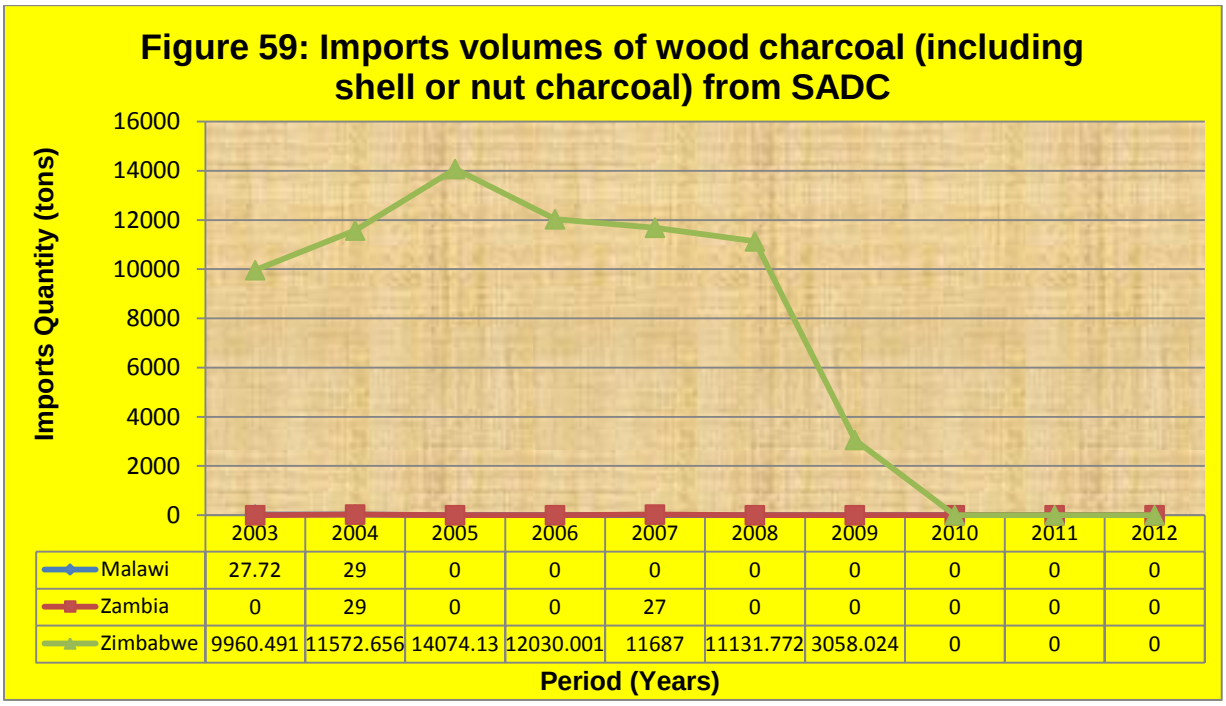


Source: Quantec

Figure 58 indicates imports volumes of wood charcoal (including shell or nut charcoal) from Africa into South Africa over the past decade. The figure further indicates that during the period under observation, SADC was the main supplier of wood charcoal into South Africa with no competition from other African regions. The figure also indicates that imports volumes of wood charcoal from SADC into South Africa started to increase in 2003, with a consistent increase in 2004 until a peak was attained in 2005 at an import quantity of about 14074 tons. The figure further indicates that between 2006 and 2012, imports volumes of wood charcoal from SADC into South Africa experienced a consistent decline to lower levels of up to 3058 tons in 2009. The figure also indicates that between 2010 and 2012 of the same period under review, there were no imports volumes of wood charcoal from the SADC region into South Africa. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from SADC into South Africa between 2010 and 2012 represents 100% as compared to 2009.

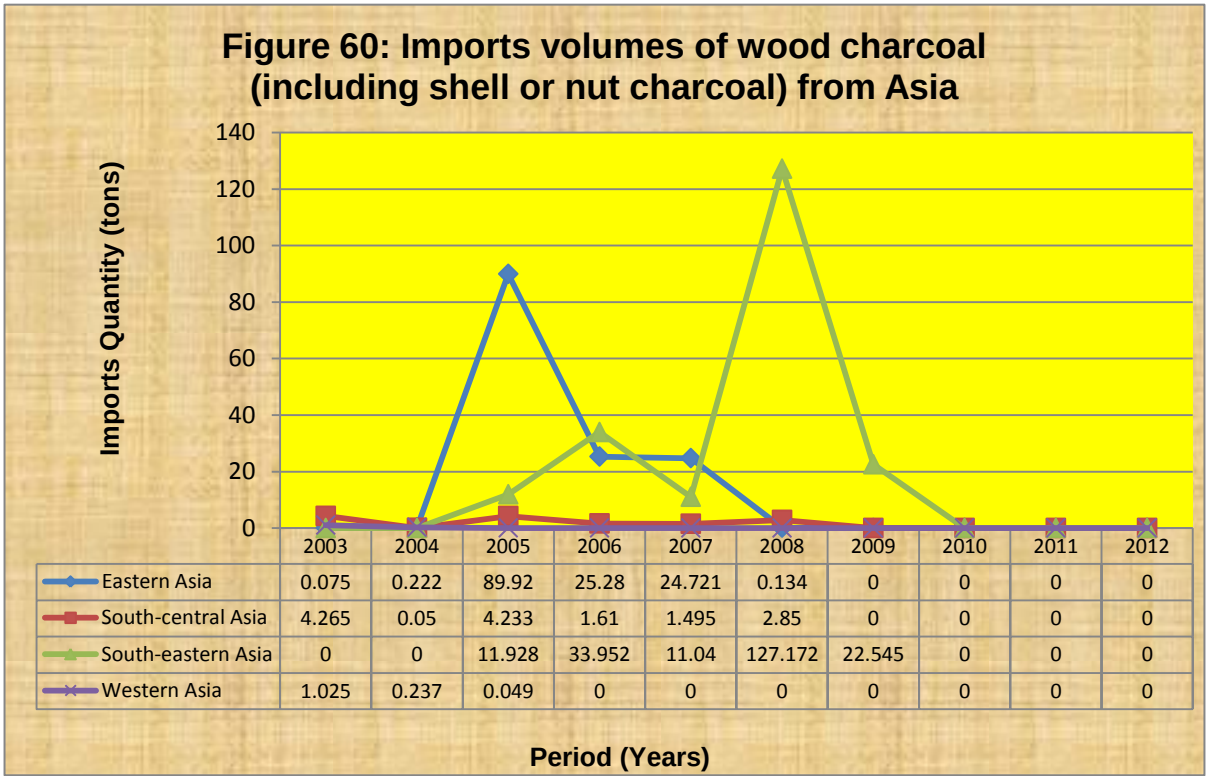
Figure 59 depicts imports volumes of wood charcoal (including shell or nut charcoal) from the SADC region into South Africa between 2003 and 2012. The graph further depicts that during the period under observation, Zimbabwe was the main supplier of wood charcoal into South Africa with no competition from other African countries. The graph also depicts that imports volumes of wood charcoal from Zimbabwe into South Africa started to increase in 2003, with a consistent increase in 2004 until a peak was attained in 2005 at an import quantity of about 14074 tons. The graph further depicts that between 2006 and 2012, imports volumes of wood charcoal from Zimbabwe into South Africa experienced a consistent decline of lower levels of up to 3058 tons in 2009. The figure also depicts that between 2010 and 2012 of the same period under examination, there were no imports volumes of wood charcoal from Zimbabwe into South Africa. The decline in imports volumes of wood charcoal (including shell or nut

charcoal) from Zimbabwe into South Africa between 2010 and 2012 represents 100% as compared to 2009.



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Malawi	27.72	29	0	0	0	0	0	0	0	0
Zambia	0	29	0	0	27	0	0	0	0	0
Zimbabwe	9960.491	11572.656	14074.13	12030.001	11687	11131.772	3058.024	0	0	0

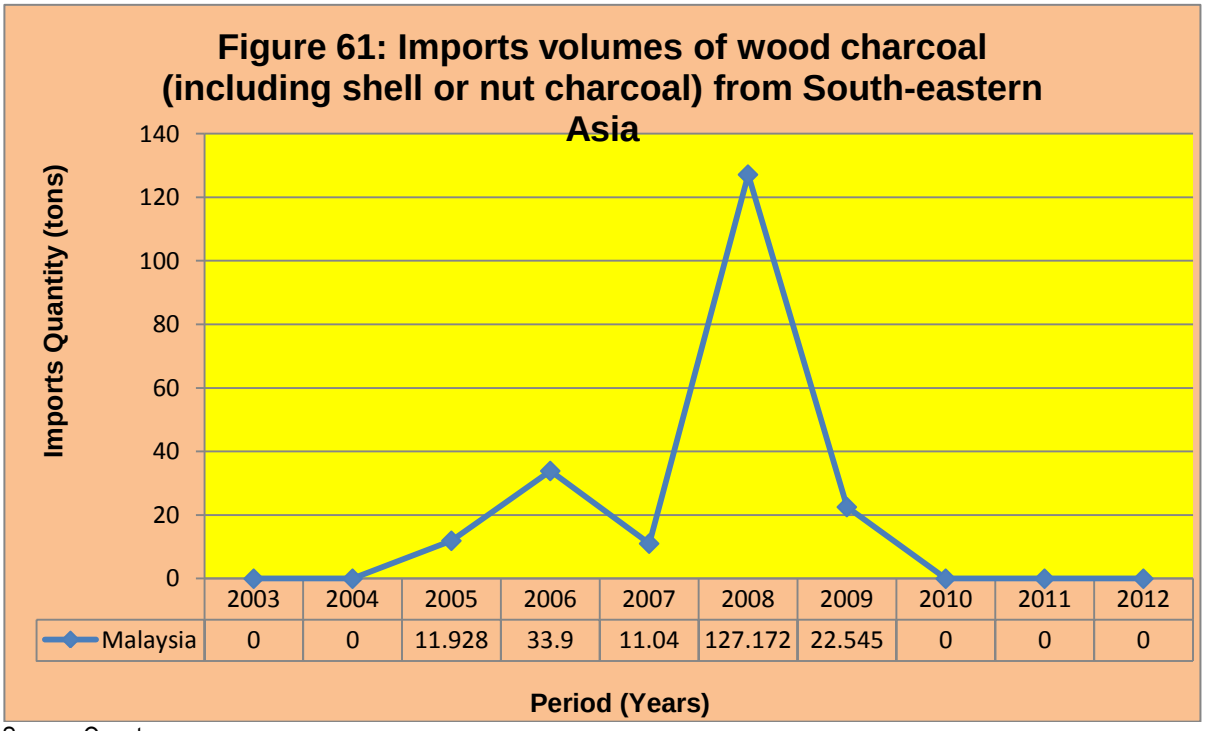
Source: Quantec



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Eastern Asia	0.075	0.222	89.92	25.28	24.721	0.134	0	0	0	0
South-central Asia	4.265	0.05	4.233	1.61	1.495	2.85	0	0	0	0
South-eastern Asia	0	0	11.928	33.952	11.04	127.172	22.545	0	0	0
Western Asia	1.025	0.237	0.049	0	0	0	0	0	0	0

Source: Quantec

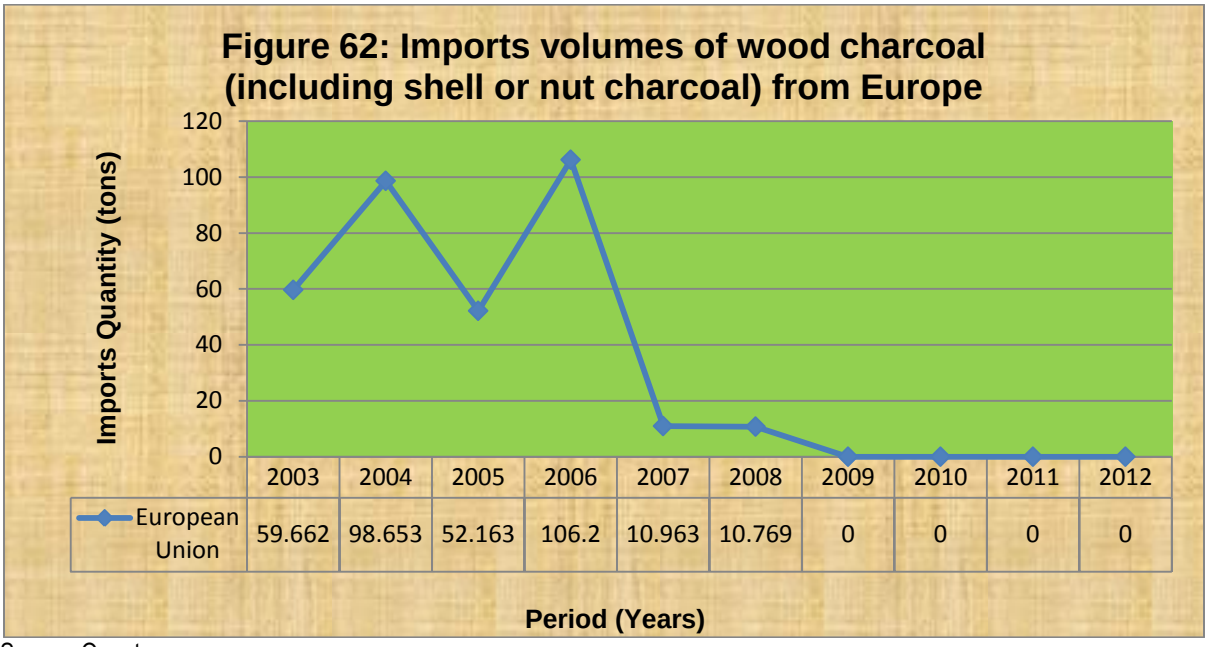
Figure 60 illustrates imports volumes of wood charcoal (including shell or nut charcoal) from Asia into South Africa over the past decade. The figure further illustrates that during the period under consideration, South-eastern Asia commanded the greatest market share of wood charcoal from Asia into South Africa, followed by Eastern Asia. The figure also illustrates that imports volumes of wood charcoal from South-eastern Asia attained a peak in 2008 at an import quantity of about 127 tons, while imports volumes of wood charcoal from Eastern Asia into South Africa attained a peak in 2005 at an import quantity of about 89 tons. The figure further illustrates that during the period under scrutiny, imports volumes of wood charcoal from South-central Asia and Western Asia into South Africa had very low import volumes of wood charcoal of not more than 5 tons. The figure also illustrates that between 2010 and 2012 of the period under examination, there were no imports volumes of wood charcoal from Asia into South Africa, also important to note was that there were no imports of wood charcoal from South-eastern Asia between 2003 and 2004. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from South-eastern Asia into South Africa between 2010 and 2012 represents 100% as compared to 2009.



Source: Quantec

Figure 61 shows imports volumes of wood charcoal (including shell or nut charcoal) from South-eastern Asia into South Africa between 2003 and 2012. The figure further shows that during the period under consideration, Malaysia commanded the greatest market share of wood charcoal from South-eastern Asia into South Africa, with no competition from other South-eastern Asian countries. The figure also shows that imports volumes of wood charcoal from Malaysia started to increase in 2005 until a significant increase in 2006 at approximately 33 tons. The figure further shows that imports volumes of wood charcoal from Malaysia into South Africa experienced a decline of 11 tons in 2007, until a peak was attained in 2008 at an import quantity of about 127.17 tons. The figure also shows that from 2009 to 2012 of the period under scrutiny, imports volumes of wood charcoal from Malaysia into South Africa declined dramatically to low import volumes of not more than 22.5 tons. The figure further shows that

between 2003 and 2004, and again between 2010 and 2012, there were no imports volumes of wood charcoal from Malaysia into South Africa. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from Malaysia into South Africa between 2010 and 2012 represents 100% as compared to 2009.

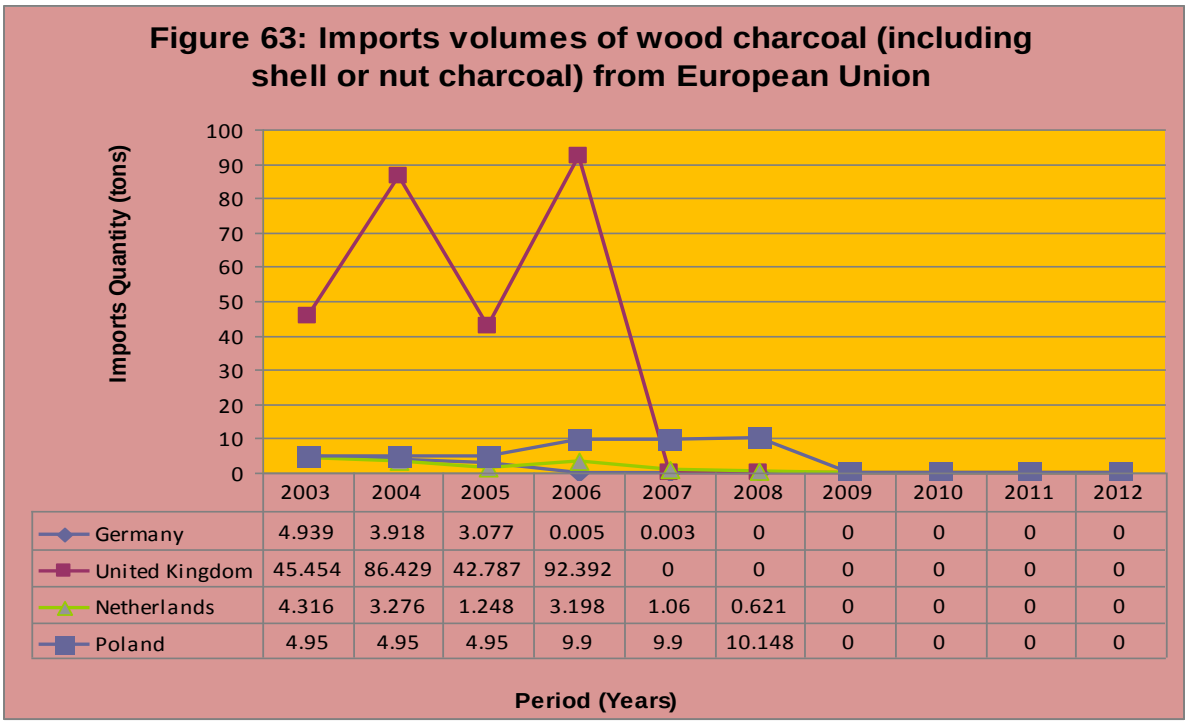


Source: Quantec

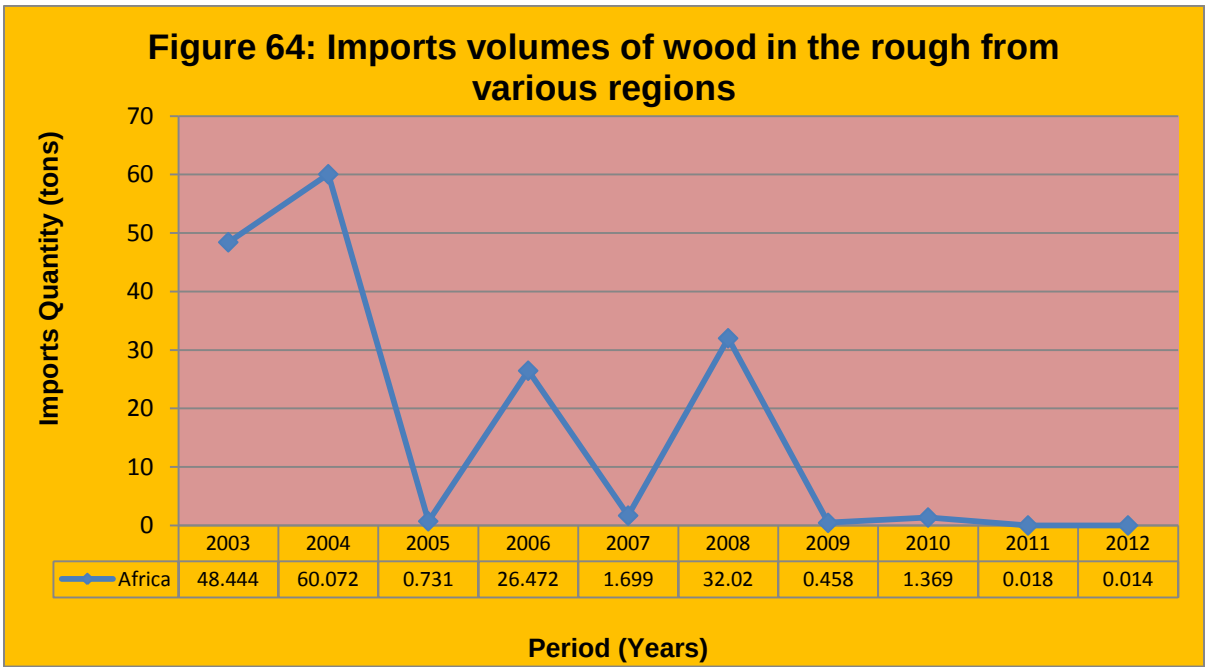
Figure 62 depicts imports volumes of wood charcoal (including shell or nut charcoal) from Europe into South Africa over the past decade. The graph further depicts that during the period under scrutiny, the major supplying market for wood charcoal from Europe into South Africa was the European Union, with no competition from other European regions. The graph also depicts that imports volumes of wood charcoal from European Union into South Africa started to increase in 2003 until a significant increase was observed in 2004 at about 98 tons. The graph also depicts that imports volumes of wood charcoal from European Union into South Africa declined in 2005 at about 52 tons, until a peak was attained in 2006 at imports volumes of approximately 106 tons. The graph further depicts that in 2007 of the period under review, imports volumes of wood charcoal from European Union into South Africa saw a dramatic decline in imports volumes of up to 10.8 tons. The graph also depicts that there were no imports volumes of wood charcoal from European Union into South Africa between 2009 and 2012. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from European Union into South Africa between 2009 and 2012 represents 100% as compared to 2008.

Figure 63 shows imports volumes of wood charcoal (including shell or nut charcoal) from European Union into South Africa between 2003 and 2012 period. The graph further shows that during the period under scrutiny, the major supplying market for wood charcoal from European Union into South Africa was United Kingdom, followed by very low volumes of wood charcoal from Poland, Germany and Netherlands. The graph also shows that imports volumes of wood charcoal from United Kingdom into South Africa started to increase in 2003 until a dramatic increase in 2004 at about 86 tons. The graph further shows that imports volumes of wood charcoal from United Kingdom into South Africa declined in 2005 at about 42 tons, until a peak was attained in 2006 at imports volumes of approximately 92 tons.

The graph further shows that between 2007 and 2012, there were no imports volumes of wood charcoal from United Kingdom into South Africa. The decline in imports volumes of wood charcoal (including shell or nut charcoal) from the United Kingdom into South Africa between 2007 and 2012 represents 100% as compared to 2006.

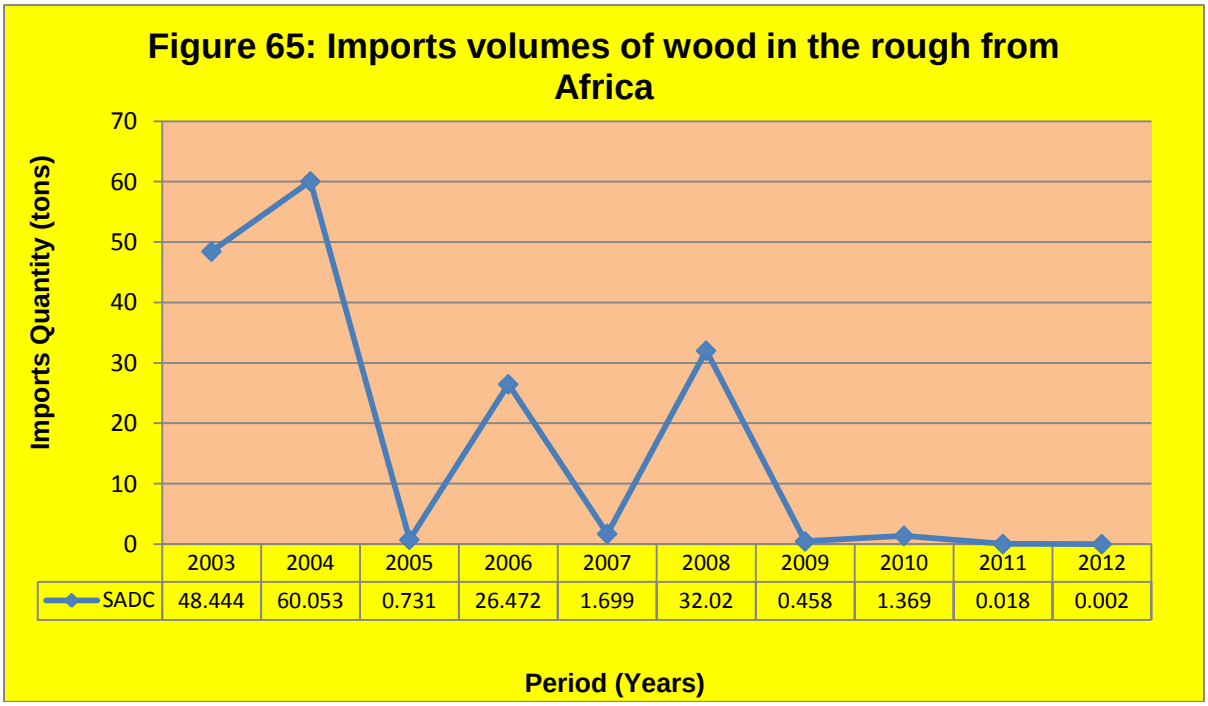


Source: Quantec



Source: Quantec

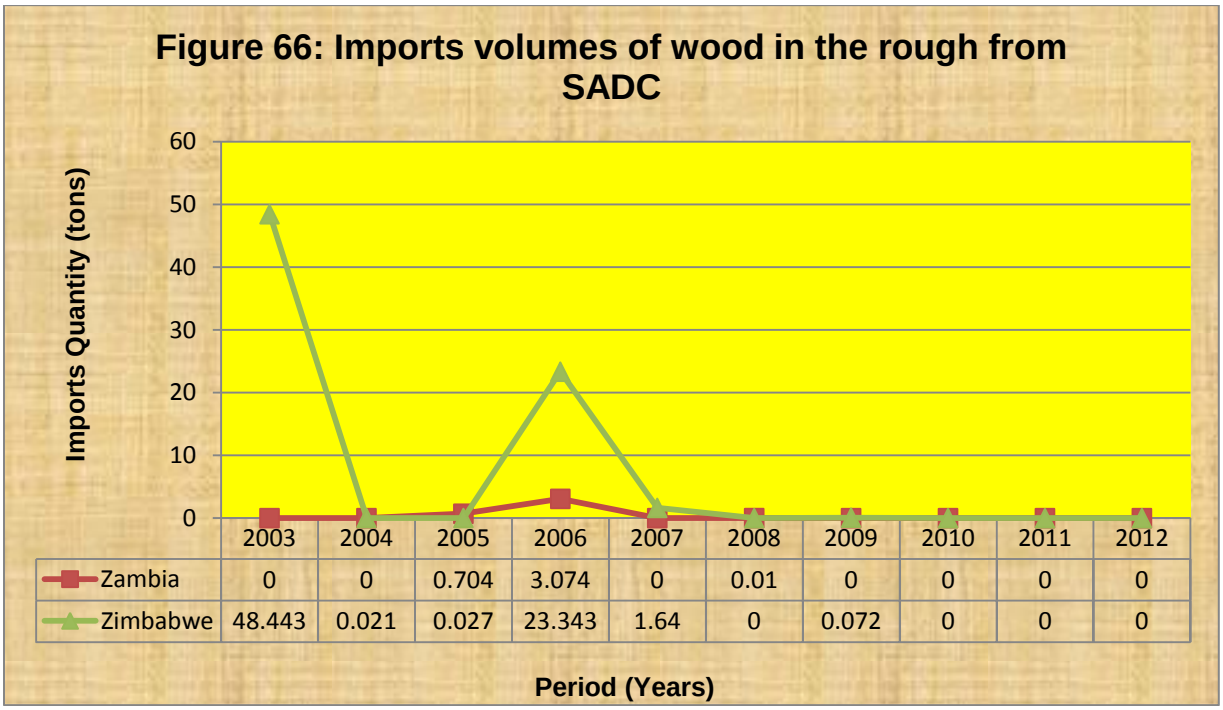
Figure 64 illustrates imports volumes of wood in the rough (whether or not stripped of bark) from various regions of the world into South Africa over the past ten years. The graph further illustrates that during the period under observation, imports volumes of wood in the rough from the world into South Africa came from Africa, with no competition from other world regions. The graph also illustrates that imports volumes of wood in the rough from Africa into South Africa started to increase in 2003 until a peak was attained in 2004 at an import quantity of about 60 tons. The graph further illustrates that imports volumes of wood in the rough from Africa into South Africa declined dramatically in 2005 to lower levels of about 0.73 tons. Between 2006 and 2008, imports volumes of wood in the rough from Africa into South Africa saw a slight increase of approximately 26 and 32 tons respectively. The graph also illustrates that between 2009 and 2012, imports volumes of wood in the rough from Africa into South Africa were very low and not more than 2 tons per annum. The decline in imports volumes of wood in the rough (whether or not stripped of bark) from Africa into South Africa in 2012 represents 0.00% as compared to 2011.



Source: Quantec

Figure 65 depicts imports volumes of wood in the rough (whether or not stripped of bark) from Africa into South Africa between 2003 and 2012. The graph further depicts that during the period under review, imports volumes of wood in the rough from Africa into South Africa originated mainly from SADC region with no competition from other African regions. The graph also depicts that imports volumes of wood in the rough from SADC region into South Africa started to increase in 2003, until a peak was attained in 2004 at an import quantity of about 60 tons. The graph further depicts that imports volumes of wood in the rough from SADC region into South Africa declined dramatically in 2005 to lower levels of about 0.73 tons. The graph also depicts that between 2006 and 2008, imports volumes of wood in the rough from SADC region into South Africa saw a slight increase in volume terms of approximately 26 and 32 tons respectively. The graph further depicts that between 2009 and 2012, imports volumes of wood in the rough from SADC into South Africa were very low and not more than 2

tons per annum. The decline in imports volumes of wood in the rough (whether or not stripped of bark) from SADC into South Africa in 2012 represents 0.00% as compared to 2011.



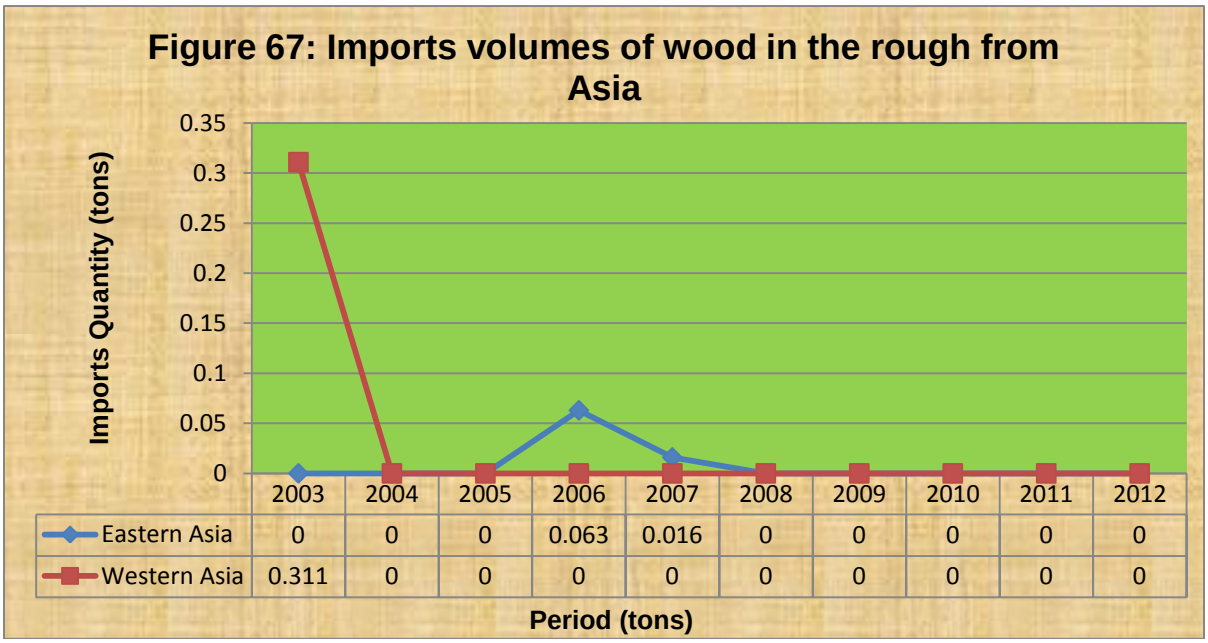
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Zambia	0	0	0.704	3.074	0	0.01	0	0	0	0
Zimbabwe	48.443	0.021	0.027	23.343	1.64	0	0.072	0	0	0

Source: Quantec

Figure 66 shows imports volumes of wood in the rough (whether or not stripped of bark) from SADC region into South Africa over the past decade. The graph further shows that during the period under review, the major supplying market for wood in the rough from SADC was Zimbabwe, followed by very intermittent imports from Zambia. The graph also shows that imports volumes of wood in the rough from Zimbabwe into South Africa started to increase in 2003 and at the same time attained a peak at an import quantity of about 48.4 tons. The graph further shows that between 2004 and 2005, imports volumes of wood in the rough from Zimbabwe into South Africa saw a dramatic decline in volume terms at approximately 0.07 tons in 2005. The graph also shows that in 2006, imports volumes of wood in the rough from Zimbabwe into South Africa increased significantly to considerable import volumes of about 23 tons, and then declined again between 2007 and 2012 to levels of about 0.01 tons. The graph further shows that in 2007, and again between 2009 and 2012, there were no imports volumes of wood in the rough from Zimbabwe into South Africa. The graph also shows that imports volumes of wood in the rough from Zambia into South Africa were very low at levels below 4 tons per annum. The decline in imports volumes of wood in the rough (whether or not stripped of bark) from Zimbabwe into South Africa between 2010 and 2012 represents 100% decline as compared to 2009.

Figure 67 reflects imports volumes of wood in the rough (whether or not stripped of bark) from Asia into South Africa between 2003 and 2012. The graph further reflects that during the period under review, the major supplying market for wood in the rough from Asia into South Africa came from Western Asia, followed by Eastern Asia. The graph also reflects that imports volumes of wood in the rough from Western Asia into South Africa started to increase in 2003 and at the same time attained a peak at an import quantity of about 0.31 tons, while imports volumes of wood in the rough from Eastern Asia into South Africa attained a peak in 2006 at an import quantity of approximately 0.06 tons. The graph

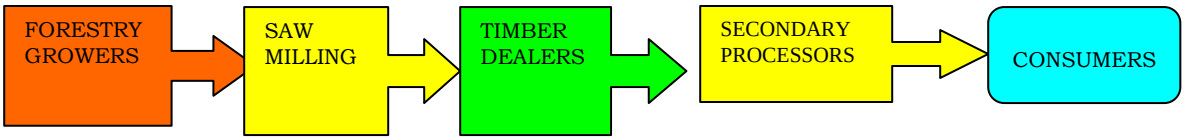
further reflects that between 2004 and 2012 of the period under scrutiny, there were no imports volumes of wood in the rough from Western Asia into South Africa, while between 2003 and 2005, and again between 2008 and 2012 of the period under observation, there were no imports volumes of wood in the rough from Eastern Asia into South Africa. The decline in imports volumes of wood in the rough (whether or not stripped of bark) from Western Asia into South Africa between 2004 and 2012 represents 100% as compared to 2003.



Source: Quantec

4. MARKET VALUE CHAIN

Figure 68: Processing of timber



- Forestry growers, of which the most profitable have their plantations located strategically close to the primary processing facilities,
- Saw milling, which is done on site by private enterprises,
- Timber dealers, which are the main timber distributors in urban areas, and
- Secondary processors (mainly furniture and construction), which to large extent also market the products to the consumers.

5. MARKET ACCESS

Tariffs that different importing countries apply to wood charcoal (including shell or nut charcoal) originating from South Africa are represented in Table 8.

Table 8: Wood charcoal (including shell or nut charcoal) exports from South Africa (HS Code 44020000) during 2011

No.	Country	Trade regime description	Applied tariffs	Total ad valorem equivalent tariff (estimated)
1	Germany	MFN duties (Applied)	0.00%	0.00%
2	United Kingdom	MFN duties (Applied)	0.00%	0.00%
3	Belgium	MFN duties (Applied	0.00%	0.00%
4	Netherlands	MFN duties (Applied)	0.00%	0.00%
5	Zambia	MFN duties (Applied)	25.00%	25.00%
		Preferential tariff for SA	0.00%	0.00%
6	Zimbabwe	MFN duties (Applied)	5.00%	5.00%
7	Mozambique	MFN duties (Applied)	2.50%	2.50%
		Preferential tariff for SA	0.00%	0.00%
8	Malawi	MFN duties	10.00%	10.00%
9	Tanzania	MFN duties (Applied)	0.00%	0.00%

Source: MacMap

Table 8 indicates tariffs that are applied by importing countries to exports of wood charcoal (including shell or nut charcoal) exported by South Africa in 2011. The table further indicates that Zambia applies high tariffs of 25% to exports of wood charcoal (including shell or nut charcoal) from South Africa, followed by Malawi at 10% during the same period under examination.

Tariffs that South Africa applies to imports of wood charcoal (including shell or nut charcoal) originating from various countries of the world are represented Table 9.

Table 9: Wood charcoal (including shell or nut charcoal) (44020000) during 2011

No.	Country	Trade regime description	Applied tariffs	Total ad valorem equivalent tariff (estimated)
1	Zimbabwe	MFN duties (Applied)	0.00%	0.00%
2	Zambia	MFN duties (Applied)	0.00%	0.00%
3	Mozambique	MFN duties (Applied	0.00%	0.00%
4	China	MFN duties (Applied)	0.00%	0.00%
5	Japan	MFN duties (Applied)	0.00%	0.00%
6	Hong Kong	MFN duties (Applied)	0.00%	0.00%
7	Germany	MFN duties (Applied)	0.00%	0.00%
9	Italy	MFN duties (Applied)	0.00%	0.00%
10	Netherlands	MFN duties (Applied)	0.00%	0.00%

Source: MacMap

Table 9 depicts tariffs that South Africa applies to imports of wood charcoal (including shell or nut charcoal) originating from various countries in 2011. The table further depicts that South Africa does not apply any tariff to imports of wood charcoal (including shell or nut charcoal) originating from the above mentioned countries during the period under review.

6. MARKET INTELLIGENCE

Table 10: List of importing markets for newsprint paper (in rolls and sheets) exported by South Africa in 2011

Importers	Trade Indicators							Tariff (estimated) faced by South Africa (%)
	Exported value 2011 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2011 (tons)	Unit value (USD/unit)	Exported growth in value between 2007-2011 (%, p.a.)	Exported growth in quantity between 2007-2011 (%, p.a.)	Exported growth in value between 2010-2011 (%, p.a.)	
World	41417	100	54686	757	26	20	6	
Zimbabwe	9793	23.6	11024	888	102	100	35	15
Kenya	5470	13.2	7489	730	20	12	-39	10
Zambia	4765	11.5	5979	797	22	19	52	0
Nigeria	3308	8	4740	698	-1	-4	-54	0
Mauritius	2852	6.9	4545	628	64	34	52	0
Malawi	2415	5.8	2693	897	7	4	-18	0
United Rep of Tanzania	2118	5.1	3158	671	7	5	6	10
Uganda	1945	4.7	2844	684	74	69	94	10
Mozambique	1699	4.1	2117	803	17	15	107	0
Madagascar	1339	3.2	2131	628	63	66	-21	0
Angola	1134	2.7	1521	746	43	70	144	2
Malaysia	904	2.2	1045	865			2913	10

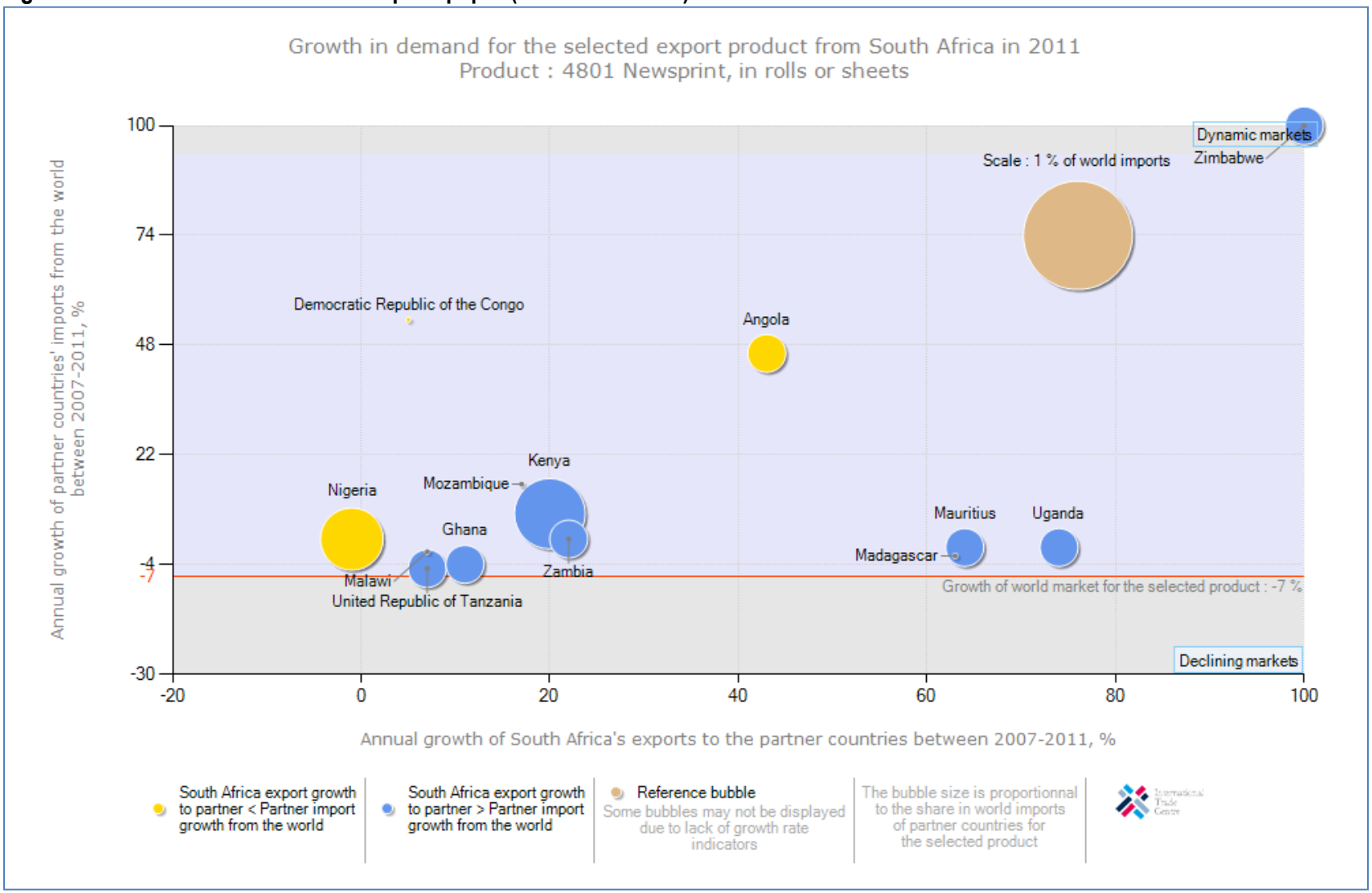
Source: ITC Trade Map

Table 10 shows exports volumes of newsprint paper (in rolls and sheets) from South Africa to the world in 2011. The table further shows that South Africa exported a total of 54686 tons of newsprint paper (in rolls and sheets) to the world during 2011. The table also shows that the major export destinations for newsprint paper from South Africa to the world was in Africa with Zimbabwe at 11024 tons, followed by Kenya at 7489 tons, Zambia at 5979 tons and Nigeria at 4740 tons.

The table further shows that Zimbabwe's share in South Africa's exports of newsprint paper increased by 23.6%, Kenya's share in South Africa's exports of newsprint paper also increased by 13.2%, Zambia's share in South Africa's exports of newsprint paper increased by 11.5% and Nigeria's share in South Africa's exports of newsprint paper also increased by 8%.

The table also shows that exports volumes of newsprint paper from South Africa to Zimbabwe grew in volume and value terms by 102% and 100% respectively between 2007 and 2011. South Africa's export growth to Kenya in volume and value terms increased by 20% and 12% respectively between 2007 and 2011, South Africa's export growth to Zambia also increased in volume and value terms at 22% and 19% between 2007 and 2011 and South Africa's export growth to Nigeria declined in volume and value terms by 1% and 4% between 2007 and 2011. The table also shows that Zimbabwe, Kenya, United Republic of Tanzania and Uganda applied tariffs of between 10 and 15% to South Africa's exports of newsprint paper during 2011.

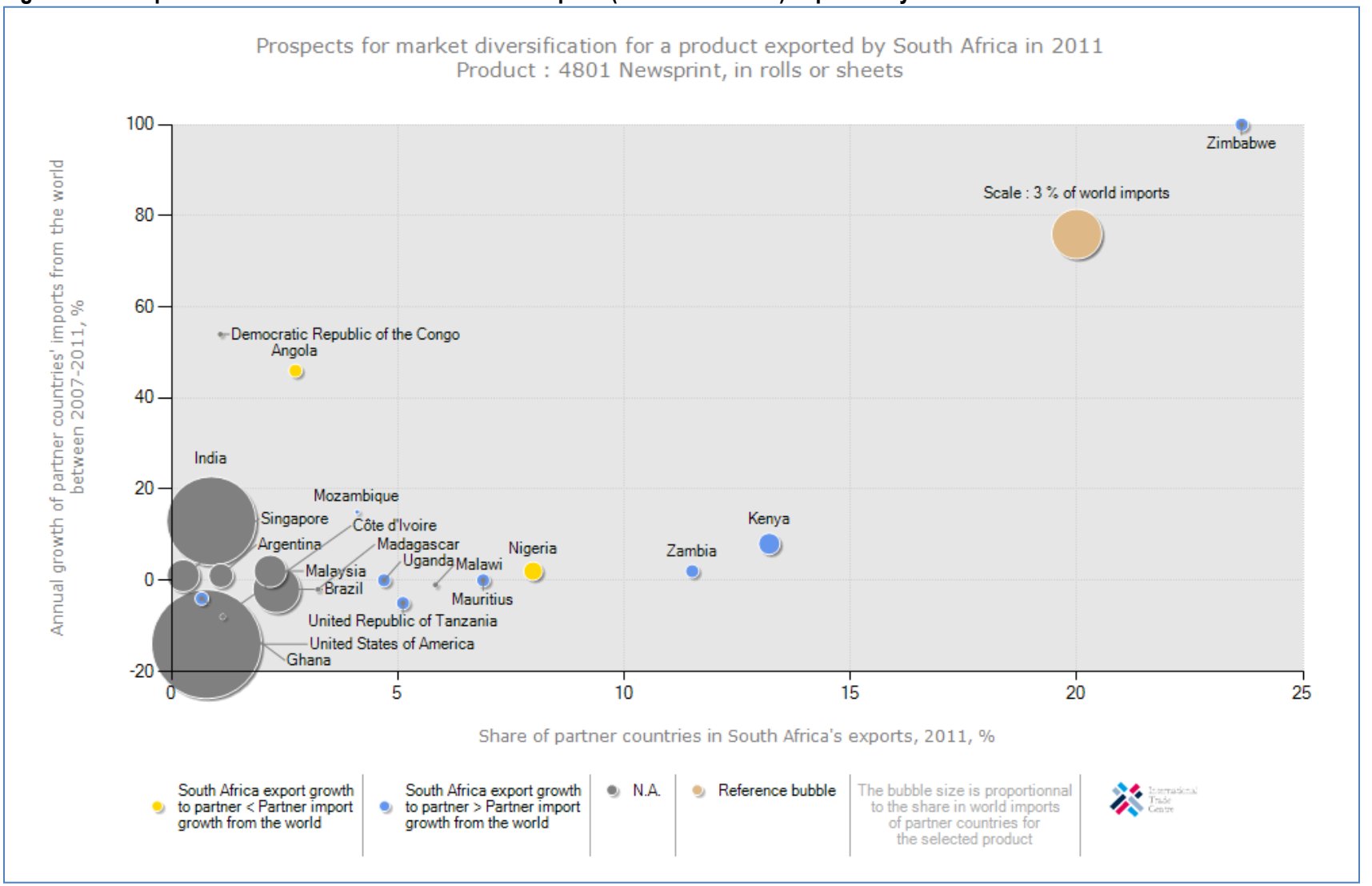
Figure 69: Growth in demand for newsprint paper (in rolls & sheets) from South Africa in 2011



Source: ITC Trade Map

Figure 69 shows growth in demand for newsprint paper (in sheets and rolls) from South Africa to the world in 2011. The bubble graph further shows that Kenya was the largest importer of newsprint (in rolls and sheets) from South Africa during 2011. However, South Africa's exports of newsprint paper (in rolls and sheets) to Kenya increased by 20% while Kenya's imports from the world also increased by 10 to 15% between 2007 and 2011. South Africa has doubled its exports of newsprint paper (in rolls and sheets) to Zimbabwe between 2007 and 2011 at approximately 100%. South Africa's newsprint paper (in rolls and sheets) exports to the above-mentioned country has outgrown these countries' growth in imports from the world between 2007 and 2011. Furthermore, South Africa has increased its newsprint paper (in rolls and sheets) exports to a declining market of Malawi and United Republic of Tanzania by above 8% over the past five years.

Figure 70: Prospects for market diversification for newsprint (in rolls & sheets) exported by South Africa in 2011



Source: ITC Trade Map

Figure 70 indicates prospects for market diversification for newsprint paper (in rolls and sheets) exported by South Africa in 2011. The bubble graph further indicates that if South Africa is to diversify its exports of newsprint paper (in rolls and sheets) from Zimbabwe to somewhere else, attractive market exist in Kenya, Zambia, Mauritius and Uganda because these countries have increased their share in South Africa's newsprint paper (in rolls and sheets) exports during 2011.

Table 11: List of supplying markets for newsprint paper (in rolls and sheets) imported by South Africa in 2011

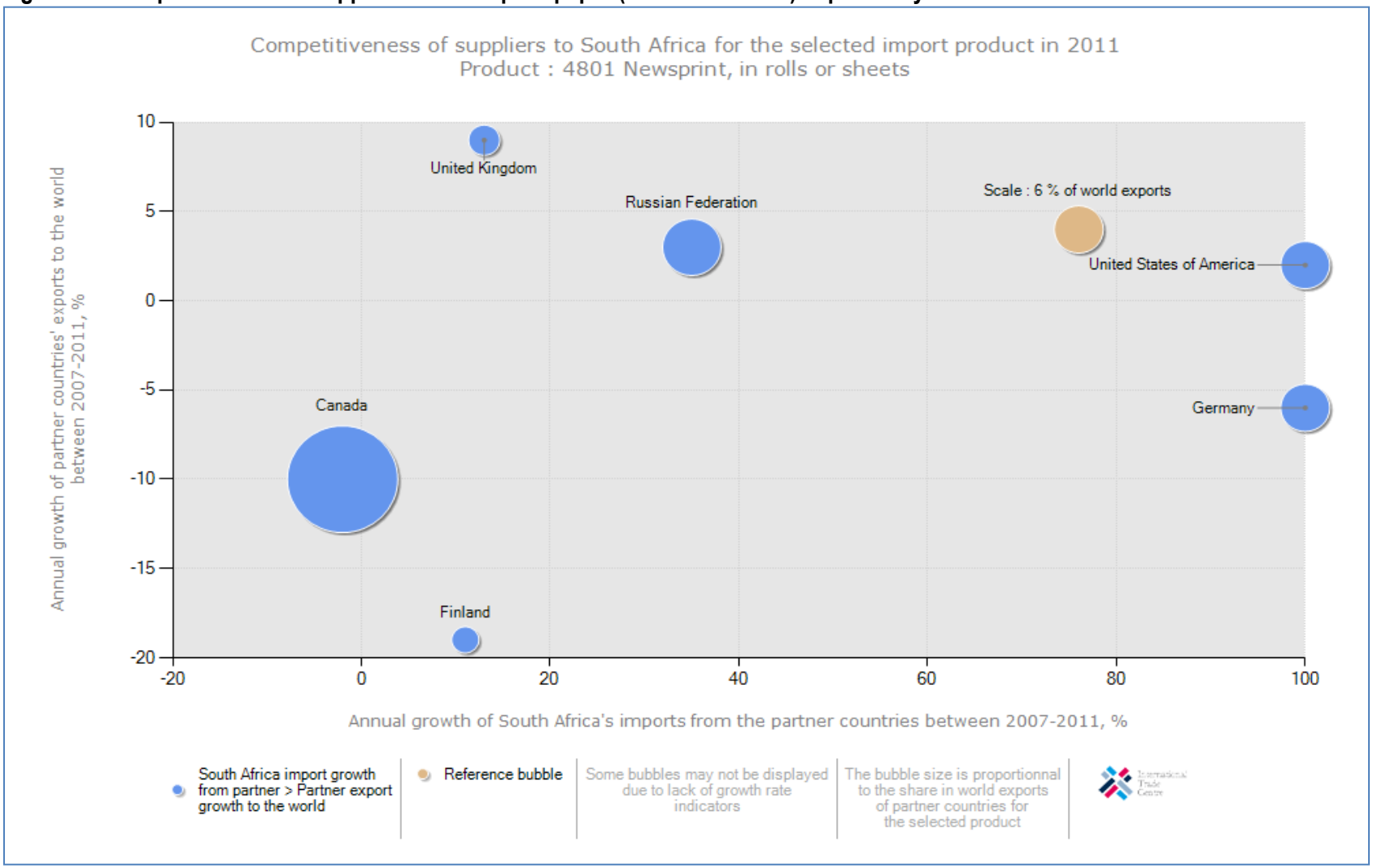
Exporters	Trade Indicators							Tariff (estimated) applied by South Africa (%)
	Imported value 2011 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2011 (tons)	Unit value (USD/unit)	Imported growth in value between 2007-2011 (%, p.a.)	Imported growth in quantity between 2007-2011 (%, p.a.)	Imported growth in value between 2010-2011 (%, p.a.)	
World	10279	100	13900	739	85	84	9	
Germany	4650	45.2	6059	767	249	276	-18	0
France	3220	31.3	4629	696				0
Netherlands	858	8.3	1128	761			-50	0
Canada	374	3.6	620	603	-2	-3		0
India	232	2.3	307	756		217	24	0
United States of America	71	0.7	81	877	103	61	109	0
Republic of Korea	33	0.3	45	733			267	0
United Kingdom	20	0.2	1	20000	13	-52	186	0
Russian federation	16	0.2	26	615	35	-15	-90	0

Source: ITC Trade Map

Table 11 depicts imports volumes of newsprint paper (in rolls and sheets) from various regions of the world into South Africa in 2011. The table further depicts that in world terms South Africa imported a total of 13900 tons of newsprint paper (in rolls and sheets) during 2011. The table also depicts that the major supplying markets for newsprint paper from the world to South Africa was Germany at 6059 tons, followed by France at 4629 tons and Netherlands at 1128 tons during 2011.

The table further depicts that Germany's share in South Africa's imports of newsprint paper increased both in volumes and value terms by 249 and 276%, France and Netherlands's share in South Africa's imports of newsprint paper was not available between 2007 and 2011. United States of America's share in South Africa's imports of newsprint paper increased both in volume and value terms by 61 and 103% between 2007 and 2011. The table further depicts that India's share in South Africa's imports of newsprint paper in volume terms increased by 217% in 2011. The table also depicts that, there were no tariffs applied by South Africa to the imports volumes of newsprint paper originating from various regions during 2011.

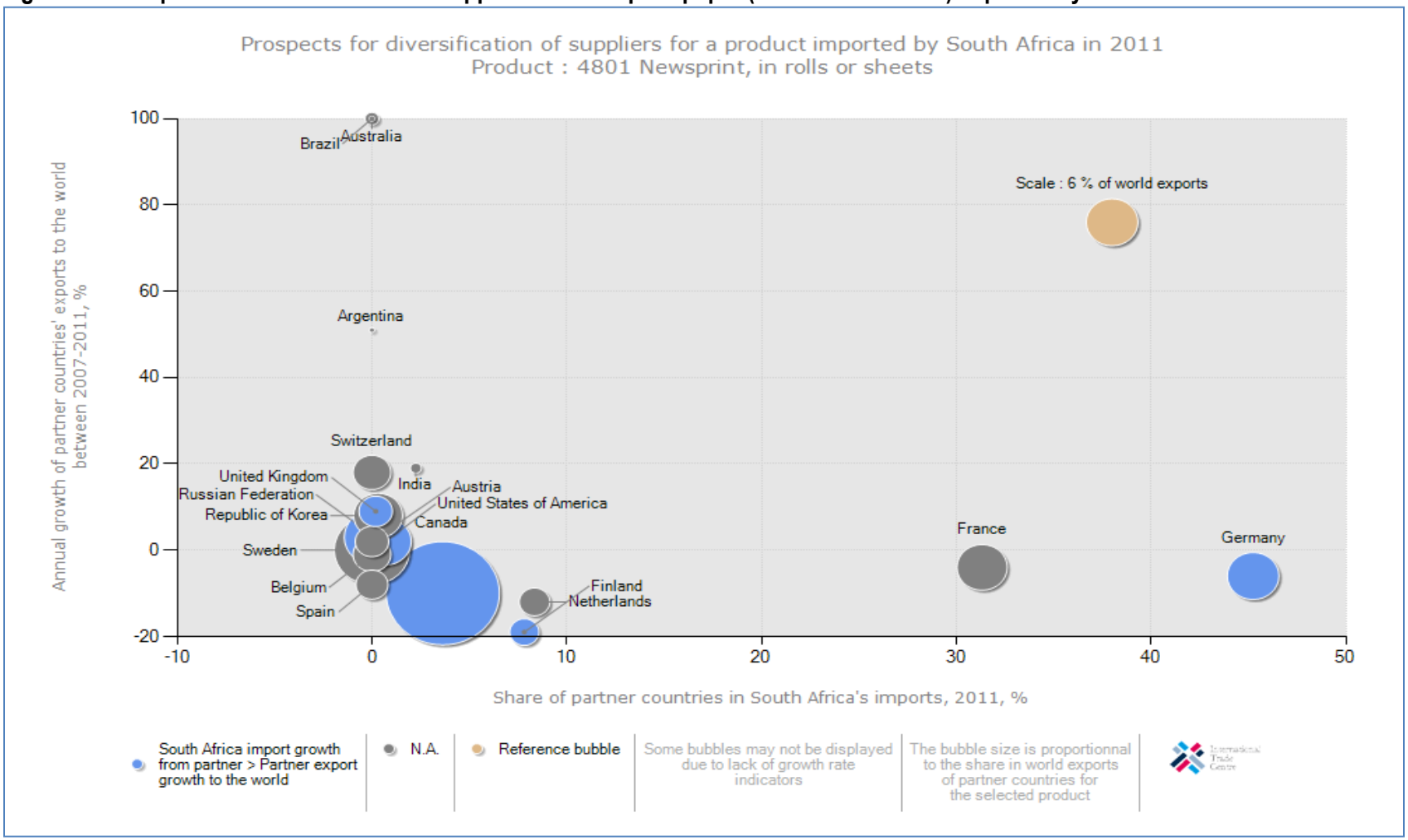
Figure 71: Competitiveness of suppliers for newsprint paper (in rolls & sheets) imported by South Africa in 2011



Source: ITC Trade Map

Figure 71 shows competitiveness of suppliers for newsprint paper imported by South Africa from the world in 2011. The bubble graph further shows that during the period between 2007 and 2011, imports of newsprint paper (in rolls and sheets) from countries such as Germany and United States of America into South Africa grew at a rate that is faster than these countries' exports to the rest of the world. Conversely imports of newsprint paper (in rolls and sheets) from Canada into South Africa declined substantially while this country's export of newsprint in rolls and sheets to the rest of the world also experienced a decline. Imports volumes of newsprint paper (in rolls and sheets) originating from Germany (the biggest supplier of newsprint paper (in rolls and sheets) into South Africa have increased by 249% in value and 276% in volume terms between the period 2007 and 2011.

Figure 72: Prospects for diversification of supplier's of newsprint paper (in rolls and sheets) imported by SA in 2011



Source: ITC Trade Map

Figure 72 depicts prospects for diversification of suppliers of newsprint paper (in rolls and sheets) imported by South Africa from the world in 2011. The bubble graph further indicates that Germany was the leading supplier of newsprint paper (in rolls and sheets) from the world into South Africa during 2011 with an imported value of 4650 thousand US Dollars, followed by France at 3220 thousand US Dollars and Netherlands at 858 thousand US Dollars. Russian Federation imported very low levels of newsprint paper (in rolls and sheets) during 2011 at an imported value of approximately 16 thousand US Dollars during the same period under observation.

Table 12: List of importing markets for fuel wood (saw dust) exported by South Africa in 2011

Importers	Trade Indicators							
	Exported value 2011 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2011 (tons)	Unit value (USD/unit)	Exported growth in value between 2007-2011 (%, p.a.)	Exported growth in quantity between 2007-2011 (%, p.a.)	Exported growth in value between 2010-2011 (%, p.a.)	Tariff (estimated) faced by South Africa (%)
World	233999	100	2218177	105	-6	-13	-4	
Japan	214414	91.6	2068125	104	-9	-14	8	0
Chinese Taipei	6611	2.8	38137	173				0
Netherlands	5250	2.2	36008	146		-17	73	0
Chile	4023	1.7	54334	74				6
United Kingdom	3370	1.4	20330	166	120	150	808	0
United Arab Emirates	98	0	353	278	-9	1	-42	4.2
Zimbabwe	83	0	497	167	45	142	15	5
Mozambique	23	0	159	145	-42	-9	-68	0
India	23	0	123	187			130	5
United Republic of Tanzania	18	0	18	1000	78			0
DRC	17	0	20	850		111		20

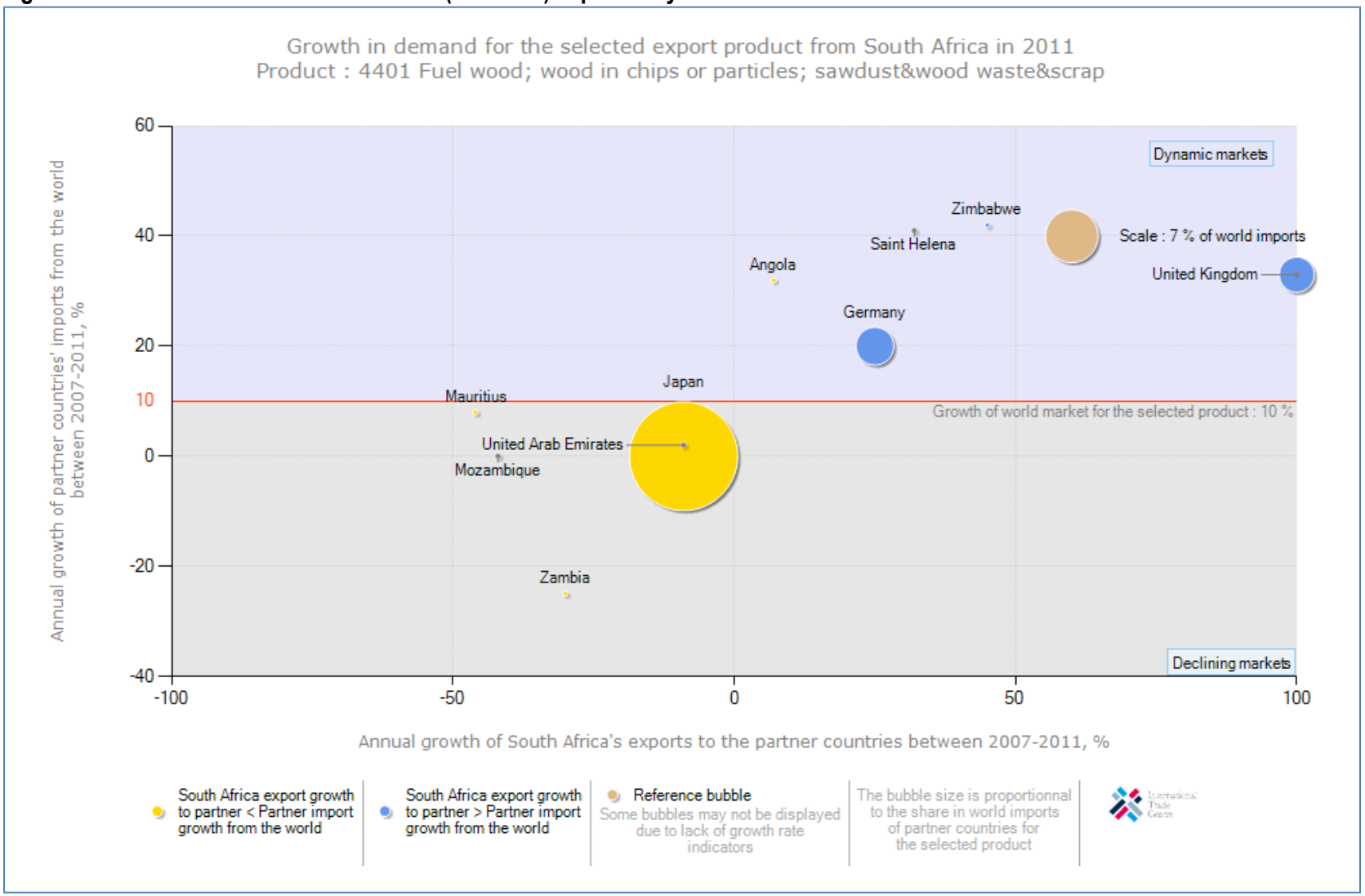
Source: Trade Map

Table 12 shows the list of importing markets for fuel wood (saw dust) exported by South Africa to the world in 2011. The table further shows that Asia (Japan) was the main market for fuel wood (saw dust) exports from South Africa to the world in 2011. The table also shows that South Africa exported 2218177 tons of fuel wood to the world in 2011, of which 2068125 tons went to Japan.

The table further shows that South Africa's exports of fuel wood (saw dust) to Japan declined both in volume and value by 9% and 14% between 2007 and 2011, while those to Chinese Taipei were not available for recording over the same period. Additionally, South Africa's fuel wood exports to Netherlands declined in volume terms by 17% between 2007 and 2011. The table also shows that growth in the value for fuel wood exports to the three markets of United Kingdom, Zimbabwe and United Republic of Tanzania was higher than the world average between 2007 and 2011.

The table further shows that during the period under review, Democratic Republic of Congo applied a high tariff of 20% to fuel wood exports originating from South Africa.

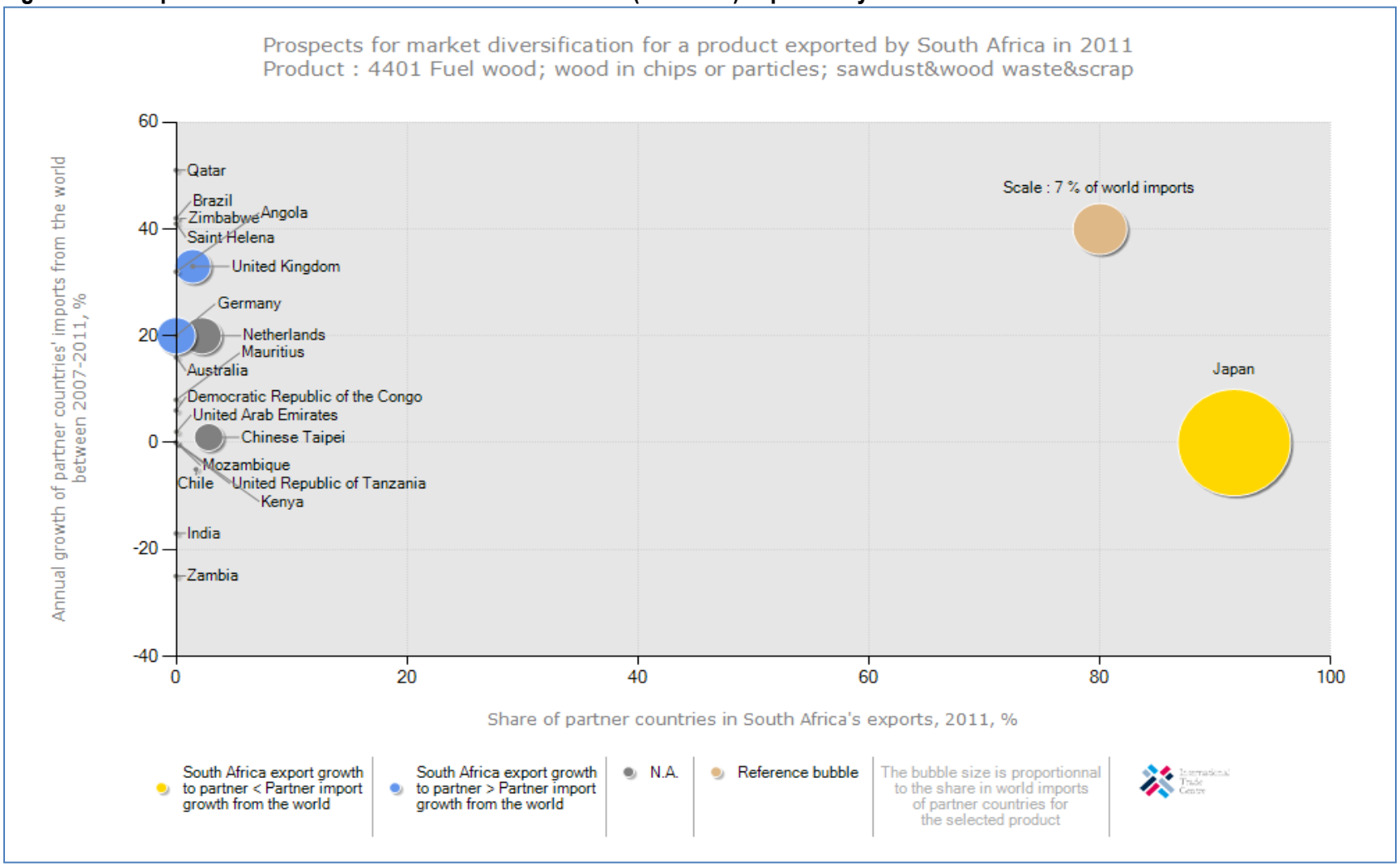
Figure 73: Growth in demand for fuel wood (saw dust) exported by South Africa in 2011



Source: Trade Map

Figure 73 reflects growth in demand for fuel wood (saw dust) exported by South Africa to the world in 2011. The bubble graph further reflects that United Arab Emirates was the biggest market of fuel wood although it was a declining market during 2011. The bubble graph also reflects that the demand for fuel wood is growing at a faster pace (100%) in the United Kingdom, followed by Zimbabwe at 45% during the period under review. The figure also reflects that during the period under scrutiny, Zimbabwe was a dynamic market because both their annual growths of South Africa's exports and their annual growth of partner countries' imports from the world were both increasing by 100% during 2007 to 2011. The table further reflects that United Arab Emirates, Zambia and Mozambique were declining markets for fuel wood exported by South Africa in 2011.

Figure 74: Prospects for market diversification for fuel wood (saw dust) exported by South Africa in 2011



Source: Trade Map

Figure 74 depicts prospects for market diversification for fuel wood (saw dust) exported from South Africa to the world in 2011. The bubble graph further depicts that Japan was the biggest market for fuel wood exports from South Africa in 2011. The figure further depicts that should South Africa wish to diversify its markets of fuel wood exports during this period, small but attractive markets are available in United Kingdom, Zimbabwe, Germany and Angola.

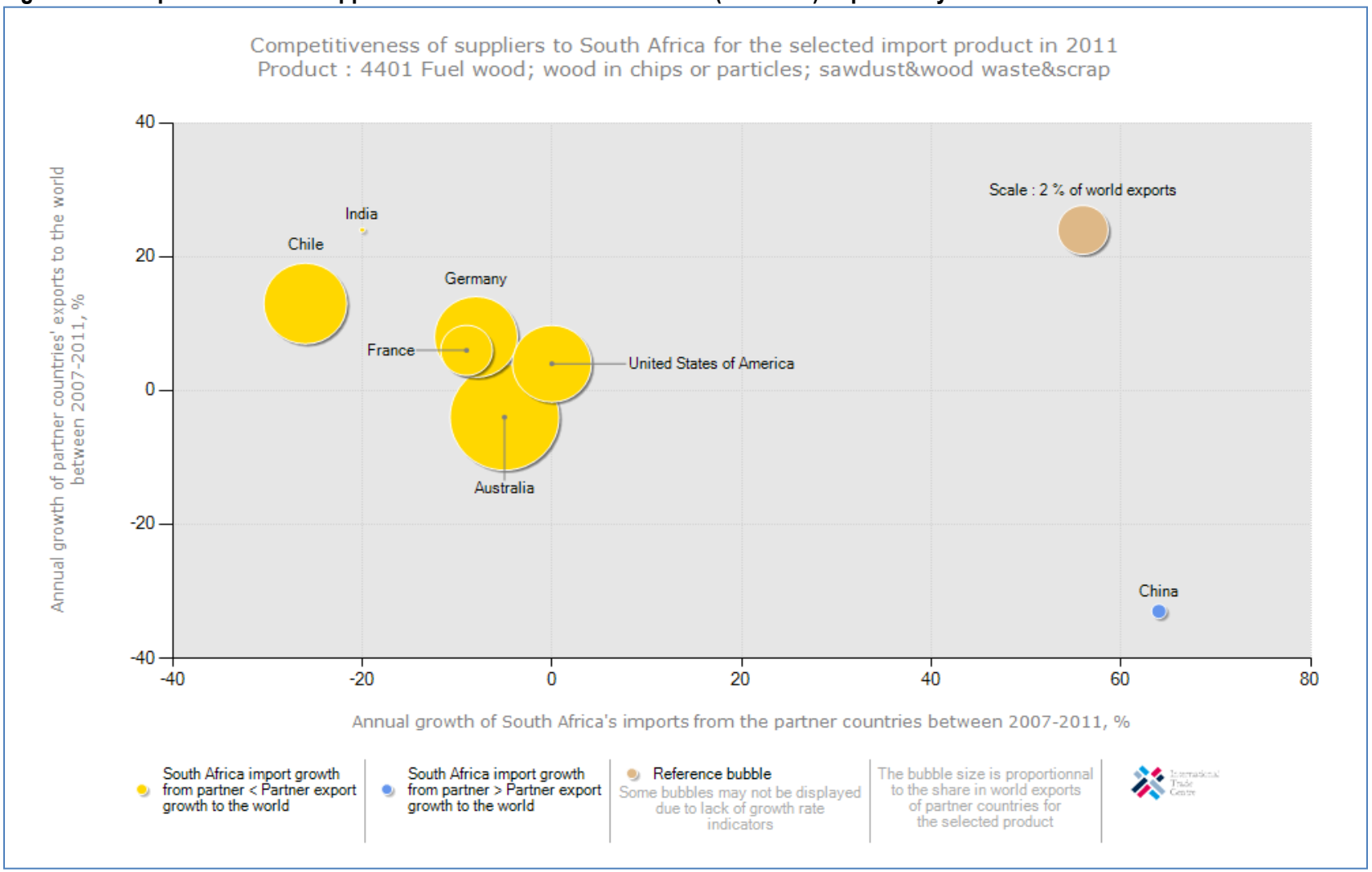
Table 13: List of supplying markets for fuel wood (saw dust) imported by SA in 2011

Exporters	Trade Indicators							Tariff (estimated) applied by South Africa (%)
	Imported value 2011 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2011 (tons)	Unit value (USD/unit)	Imported growth in value between 2007-2011 (%, p.a.)	Imported growth in quantity between 2007-2011 (%, p.a.)	Imported growth in value between 2010-2011 (%, p.a.)	
World	695	100	497	1398	-5	-6	12	
Germany	183	26.3	220	832	-8	-5	-14	0
France	173	24.9	71	2437	-9	-18	108	0
United States of America	104	15	55	1891	0	-8	-46	0
Australia	98	14.1	22	4455	-5	4	1860	0
Hungary	63	9.1	16	3938			-10	0
Netherlands	22	3.2	41	537				0
India	20	2.9	24	833	-20	-21	54	0
China	19	2.7	31	613	64	16	0	0
Belgium	6	0.9	13	462				0
Chile	5	0.7	2	2500	-26	-16	-44	0

Source: Trade Map

Table 13 indicates that the list of supplying markets for fuel wood (saw dust) imported by South Africa from the world in 2011. The table further indicates that during the period under observation, South Africa imported a total of 497 tons of fuel wood originating from various regions of the world. The table also indicates that Germany was the main supplying market for fuel wood into South Africa during 2011. The table further indicates that South Africa imported 220 tons from Germany, 71 tons from France, 55 tons from USA and 22 tons from Australia.

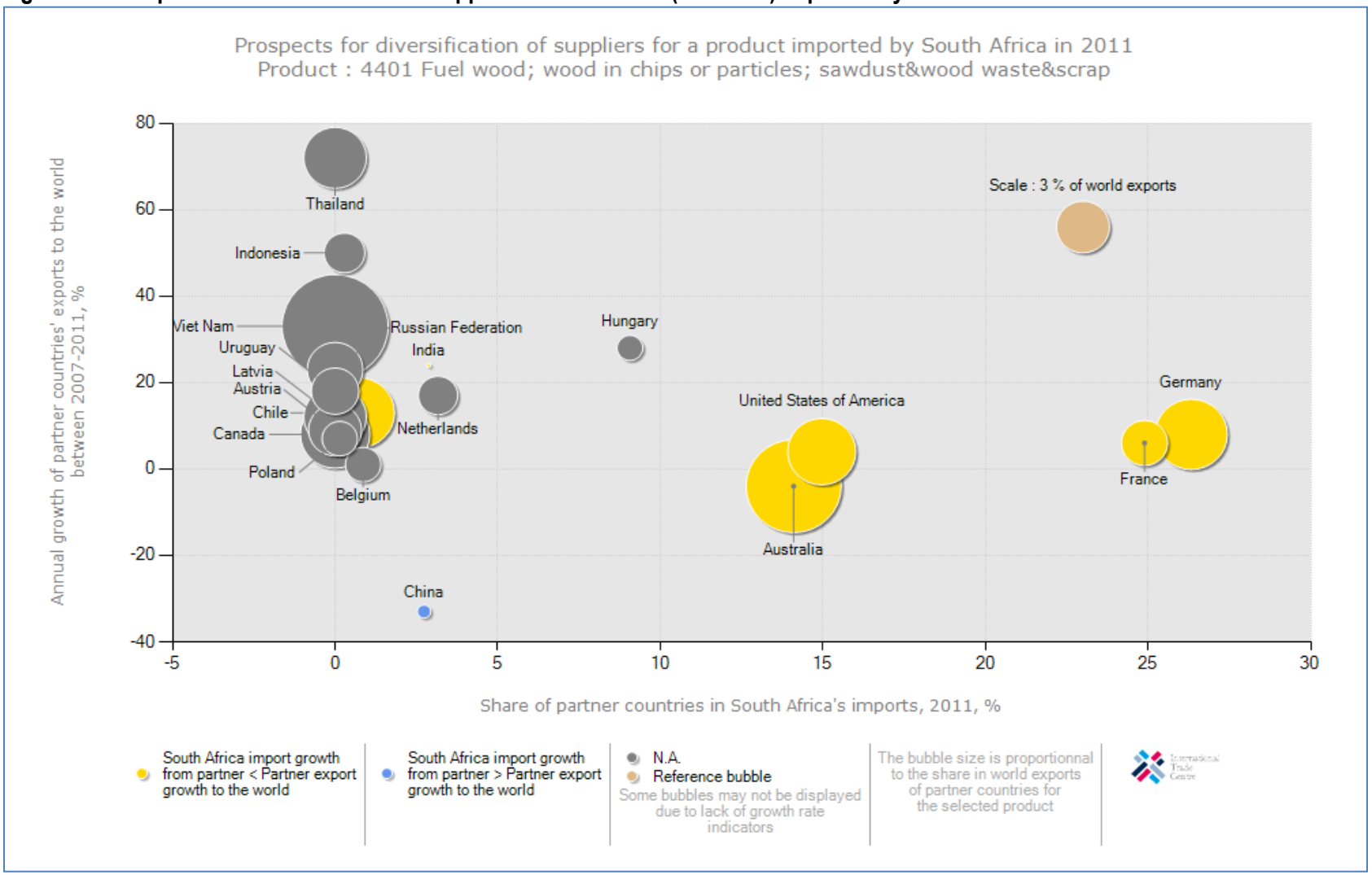
Figure 75: Competitiveness of suppliers to South Africa for fuel wood (saw dust) imported by SA in 2011



Source: Trade Map

Figure 75 shows competitiveness of suppliers to South Africa for fuel wood (saw dust) imported by South Africa from the world in 2011. The bubble graph further shows that during the period under review, Australia was the biggest supplier of fuel wood from the world into South Africa in 2011, followed by USA, Germany and Chile. China was the most competitive market for fuel wood imports into South Africa during the period between 2007 and 2011 at approximately 64%.

Figure 76: Prospects for diversification of suppliers for fuel wood (saw dust) imported by South Africa in 2011



Source: Trade Map

Figure 76 indicates prospects for diversification of suppliers for fuel wood (saw dust) imported by South Africa from the world in 2011. The bubble graph further indicates that during the period under review; Australia and Germany were the biggest markets for fuel wood imports into South Africa, followed by Netherlands, USA and France. The bubble graph also indicates that if South Africa had to diversify its suppliers of fuel wood (saw dust), small supplying markets exist in China.

Table 14: List of importing markets for wood charcoal (including shell and nut charcoal) exported by South Africa in 2011

Importers	Trade Indicators							Tariff (estimated) faced by South Africa (%)
	Exported value 2011 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2011 (tons)	Unit value (USD/unit)	Exported growth in value between 2007-2011 (%, p.a.)	Exported growth in quantity between 2007-2011 (%, p.a.)	Exported growth in value between 2010-2011 (%, p.a.)	
World	12556	100	20555	611	27	20	34	
United Kingdom	8082	64.4	12196	663	46	41	-38	0
Netherlands	1045	8.3	2108	496	-10	-14	-63	0
Sweden	935	7.4	1884	496	60	85	17	0
Switzerland	511	4.1	892	573	57	45	40	0
France	421	3.4	781	539	33	22	11	0
Israel	278	2.2	454	612	1	-2	-26	6
Australia	268	2.1	593	452			195	0
Germany	183	1.5	359	510	-15	-18	-56	0
United Arab Emirates	150	1.2	241	622	36	34	285	0
India	98	0.8	26	3769				5
Mauritius	82	0.7	124	661	59	45	110	0
Greece	77	0.6	197	391	39	42	114	0
Mayotte	75	0.6	153	490			1775	5
Cyprus	44	0.4	90	489	47	30	-88	0
Israel	278	2.2	454	612	1	-2	-26	6
Australia	268	2.1	593	452			195	0
Germany	183	1.5	359	510	-15	-18	-56	0

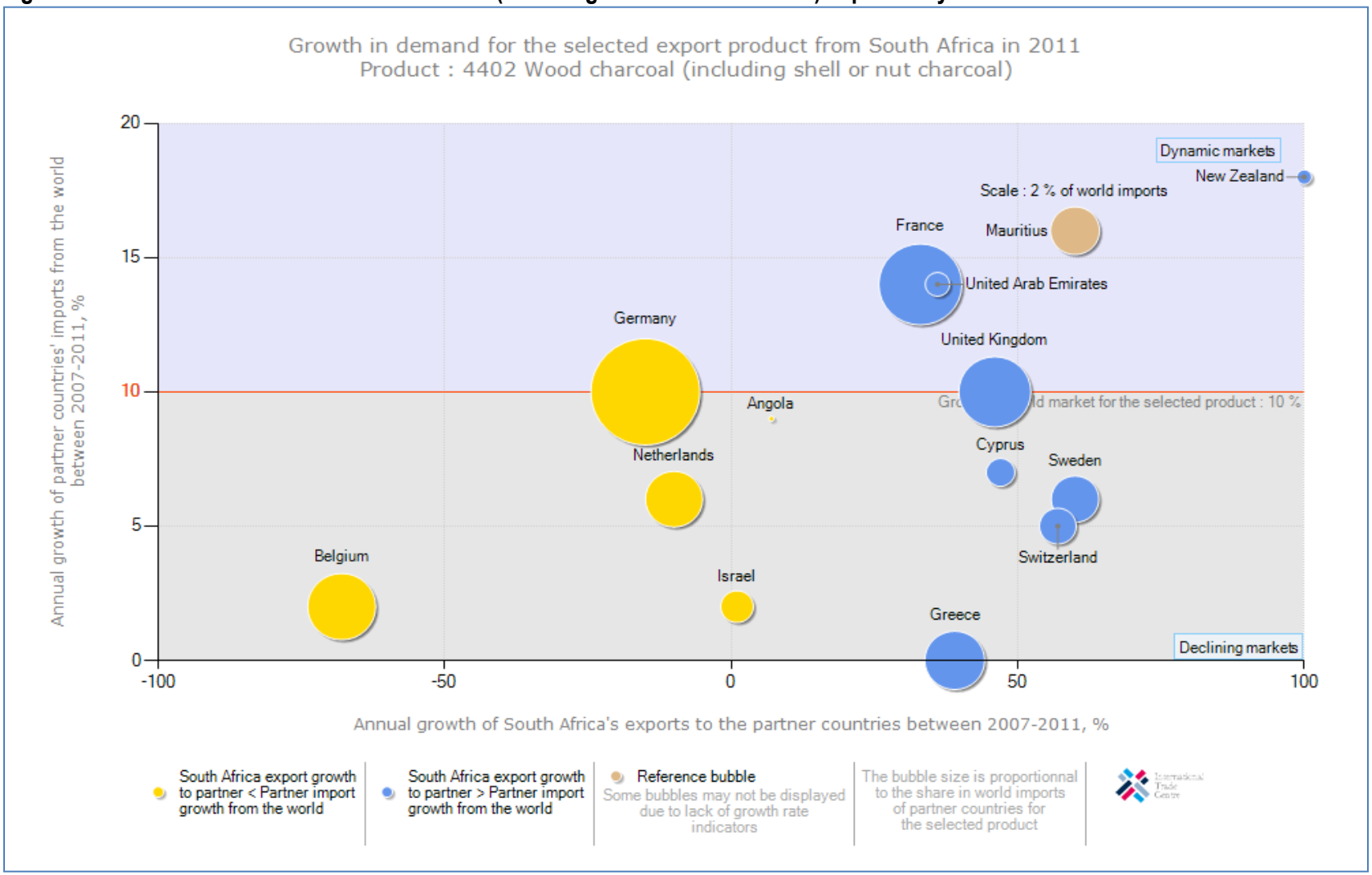
Source: Trade Map

Table 14 depicts the list of importing markets for wood charcoal (including shell or nut charcoal) exported by South Africa to the world in 2011. The table further depicts that Europe (United Kingdom, Netherlands and Sweden) were the main export markets for wood charcoal originating from South Africa. The table further depicts that South Africa exported 20555 tons to the world in 2011. The table also depicts that most of South Africa's wood charcoal exports went to United Kingdom (12196 tons), followed by Netherlands at 2108 tons and Sweden at 1884 tons.

The table also depicts that South Africa's exports of wood charcoal to the United Kingdom increased in value and volume terms by 46% and 41% respectively between 2007 and 2011. The table depicts that South Africa's exports (in volume and value terms) to Netherlands decreased in value and volume terms by 10% and 14% respectively between 2007 and 2011, while those to Sweden also increased by 60% in value and 85% in volume terms between 2007 and 2011.

The table further depicts that United Kingdom's share in South Africa's wood charcoal exports increased by 64.4%, Netherlands share also increased by 8.3% and Sweden's share by 7.4% in 2011.

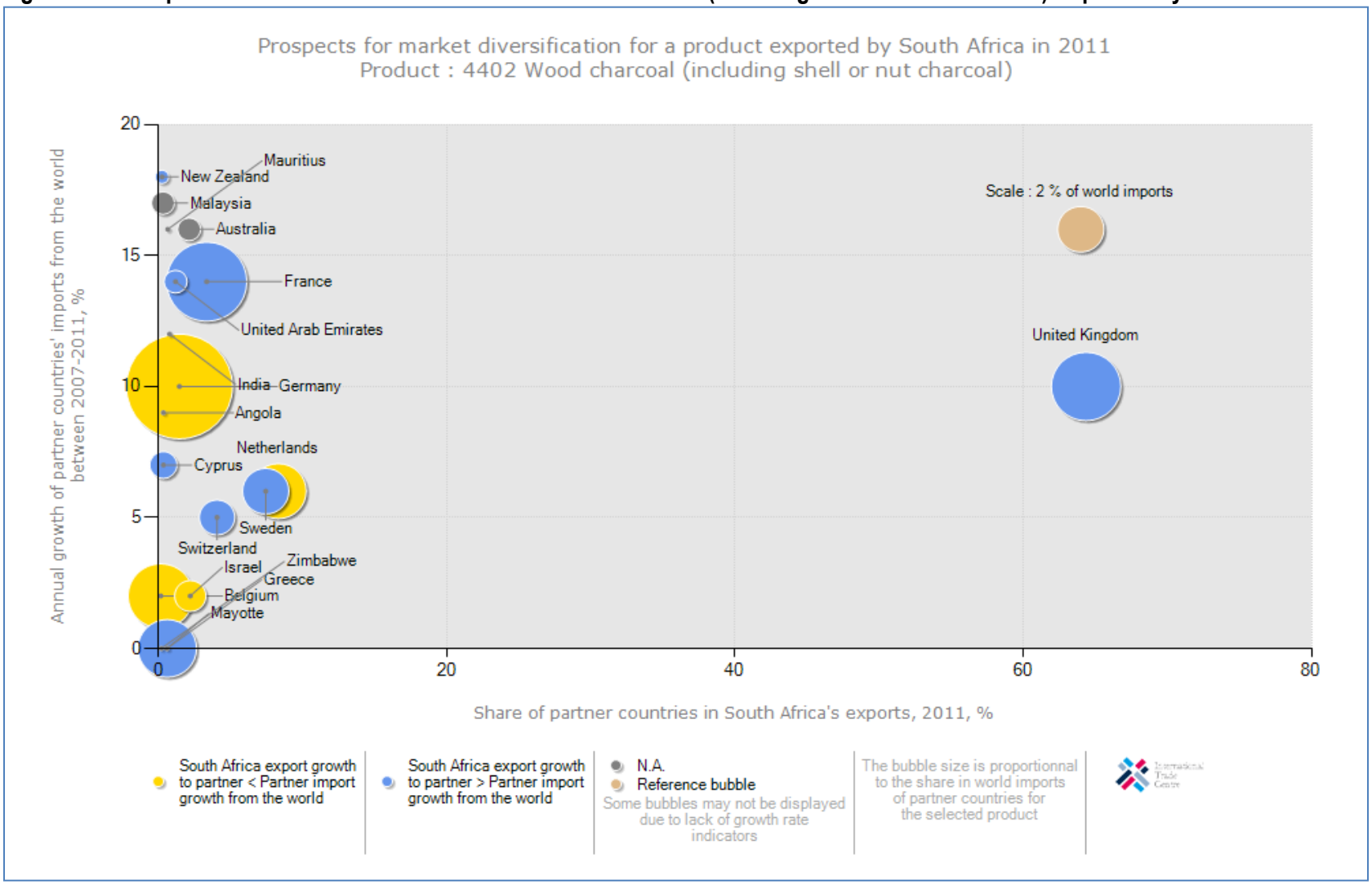
Figure 77: Growth in demand for wood charcoal (including shell or nut charcoal) exported by South Africa in 2011



Source: Trade Map

Figure 77 reflects growth in demand for wood charcoal (shell or nut charcoal) exported by South Africa to the world in 2011. The figure further reflects that Germany was the biggest market of wood charcoal exported by South Africa to the world in 2011. The figure also reflects that the demand for wood charcoal is growing at a faster pace (100%) in New Zealand and United Arab Emirates (40%), while annual growth of South Africa exports to declining markets such as Sweden, Switzerland Cyprus and Greece are growing at between 40 and 60%. The graph also reflects that New Zealand and United Arab Emirates are dynamic markets because both their annual growths of South Africa's exports and their annual growth of partner countries' imports from the world were between 10% and 20% between 2007 and 2011.

Figure 78: Prospects for market diversification for wood charcoal (including shell or nut charcoal) exported by South Africa in 2011



Source: Trade Map

Figure 78 shows prospects for market diversification for wood charcoal (shell or nut charcoal) exported by South Africa to the world in 2011. The figure further shows that in 2011, United Kingdom and Netherlands were the biggest markets for wood charcoal (shell or nut charcoal) exports from South Africa. The figure further shows that should South Africa want to diversify its markets of wood charcoal exports, small but attractive markets are available in New Zealand, United Arab Emirates and Cyprus.

Table 15: List of supplying markets for wood charcoal (including shell or nut charcoal) imported by South Africa in 2011

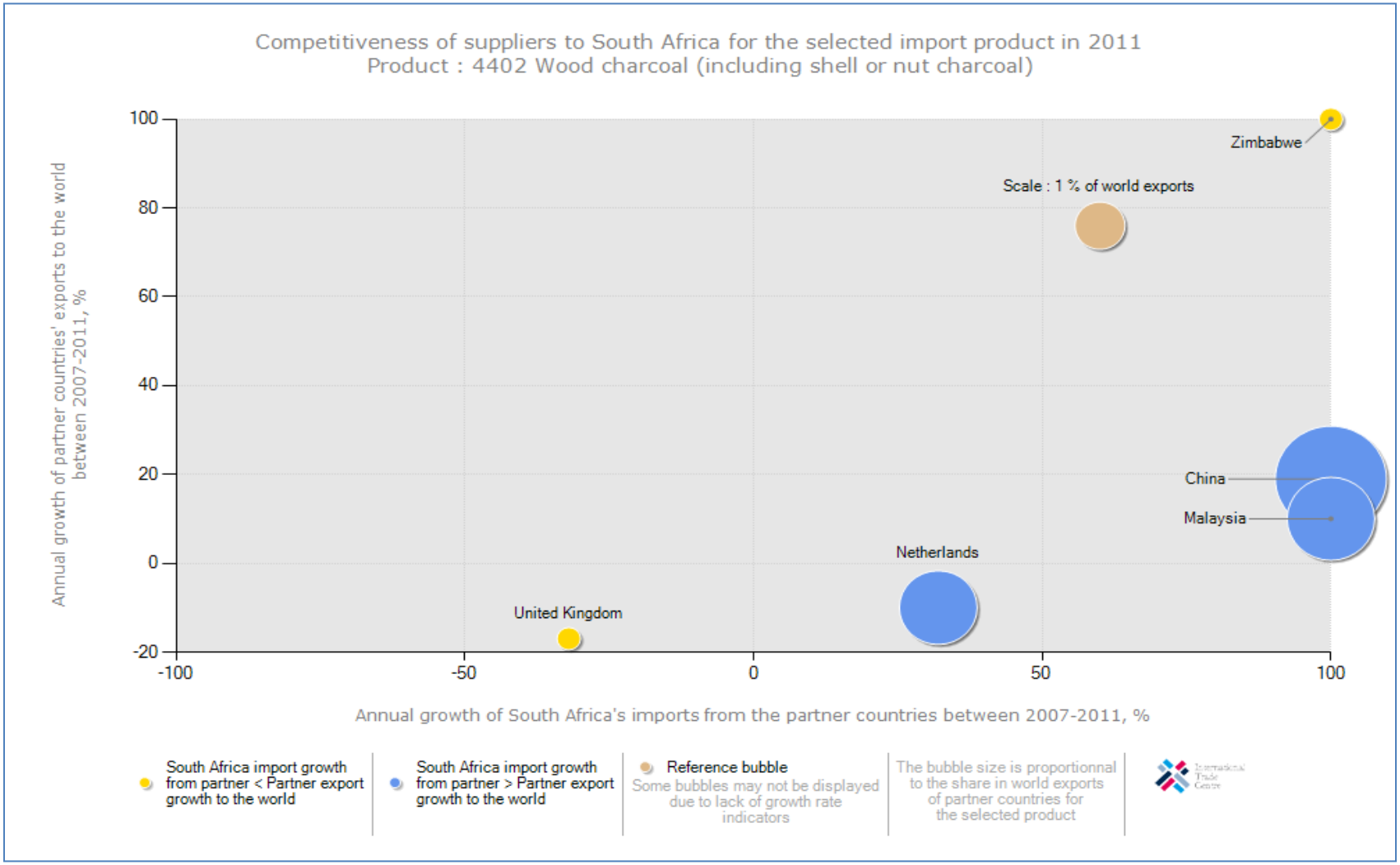
Exporters	Trade Indicators							Tariff (estimated) applied by South Africa (%)
	Imported value 2011 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2011 (tons)	Unit value (USD/unit)	Imported growth in value between 2007-2011 (%, p.a.)	Imported growth in quantity between 2007-2011 (%, p.a.)	Imported growth in value between 2010-2011 (%, p.a.)	
World	3340	100	11108	301	77	190	44	
Zimbabwe	1768	52.9	10101	175	617	557	70	0
China	1040	31.1	738	1409	102	96	28	0
Malaysia	371	11.1	82	4524	122	16	8	0
South Africa	59	1.8	108	546				
Netherlands	35	1	5	7000	32	20	75	0
United Kingdom	30	0.9	10	3000	-32	-43	-58	0
Poland	19	0.6	7	2714			-53	0
India	13	0.4	28	464			550	0

Source: Trade Map

Table 15 depicts the list of supplying markets for wood charcoal (including shell or nut charcoal) imported from the world by South Africa in 2011. The table further depicts that Africa (Zimbabwe and Malaysia) were the main supplying markets for wood charcoal into South Africa during 2011 period. The table further depicts that, South Africa exported 11108 tons from the world in 2011. The table also depicts that most of South Africa's wood charcoal imports were from Zimbabwe at 10101 tons, followed by China at 738 tons and Malaysia at 82 tons.

The table further depicts that Zimbabwe's share in South Africa's imports experienced an increase of about 52.9%, followed by China's share in South Africa's imports also experienced an increase of about 31.1% and Malaysia's share in South Africa's imports also experienced an increase of about 11.1%.

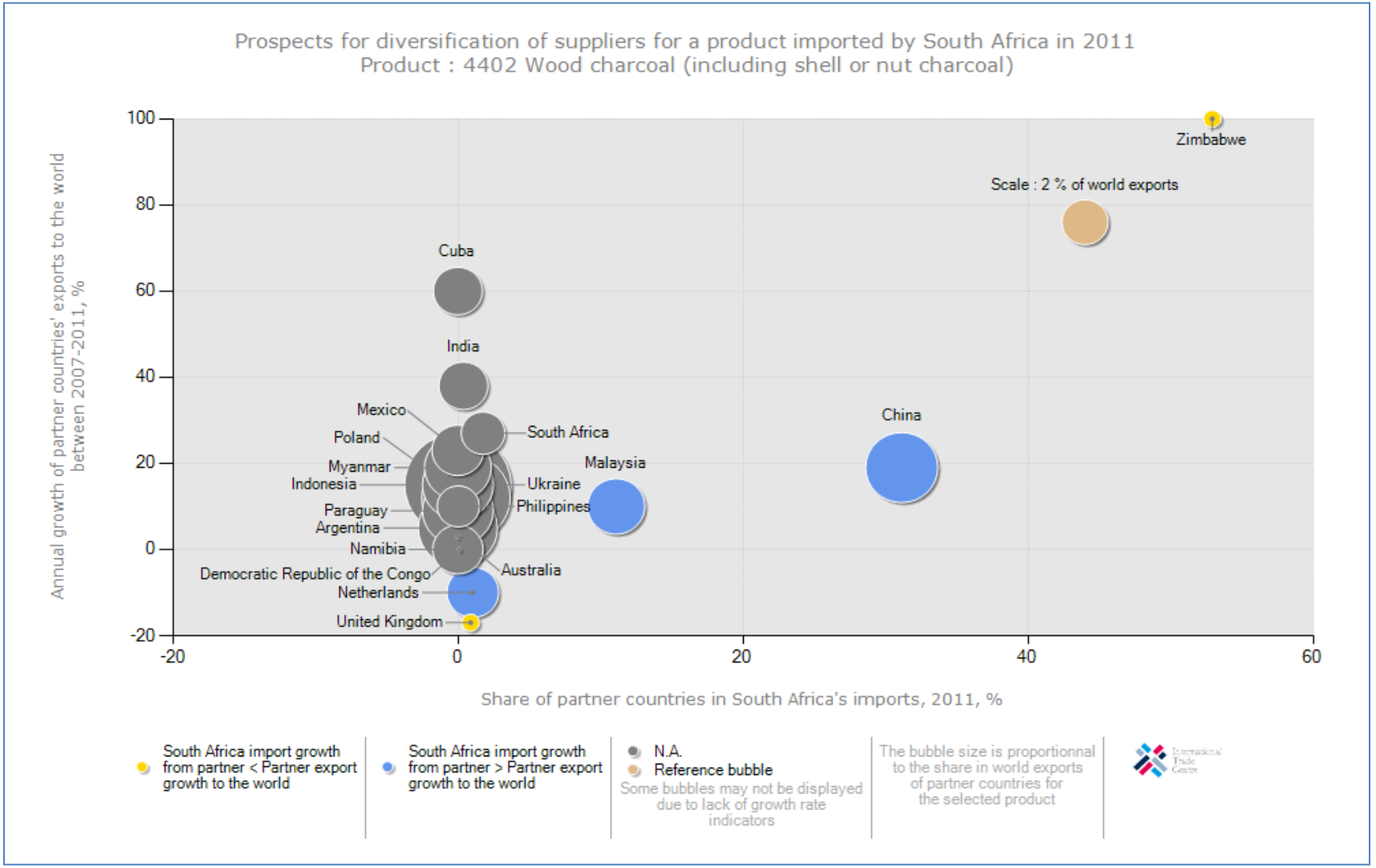
Figure 79: Competitiveness of suppliers to South Africa for wood charcoal (including shell or nut charcoal) imported by South Africa in 2011



Source: Trade Map

Figure 79 depicts competitiveness of suppliers of wood charcoal (shell or nut charcoal) from the world into South Africa in 2011. The figure further shows that during the period under examination, Zimbabwe was the biggest market for wood charcoal. The figure also depicts that during the period under examination, China with 100% annual growth followed by Malaysia with also 100% and Netherlands with 40% were the most competitive suppliers for wood charcoal (shell or nut charcoal) imports into South Africa between 2007 and 2011.

Figure 80: Prospects for diversification of suppliers for wood charcoal (including shell or nut charcoal) imported by South Africa 2011



Source: Trade Map

Figure 80 indicates prospects for diversification of suppliers for wood charcoal (including shell or nut charcoal) imported from the world by South Africa in 2011. The figure further indicates that during the period under review; China was the biggest market for wood charcoal imports into South Africa. The figure also indicates that if South Africa had to diversify its suppliers of wood charcoal, small but attractive (suppliers) markets exist in Malaysia and Netherlands.

Table 16: List of importing markets for wood in the rough (whether or stripped of bark) exported by SA in 2011

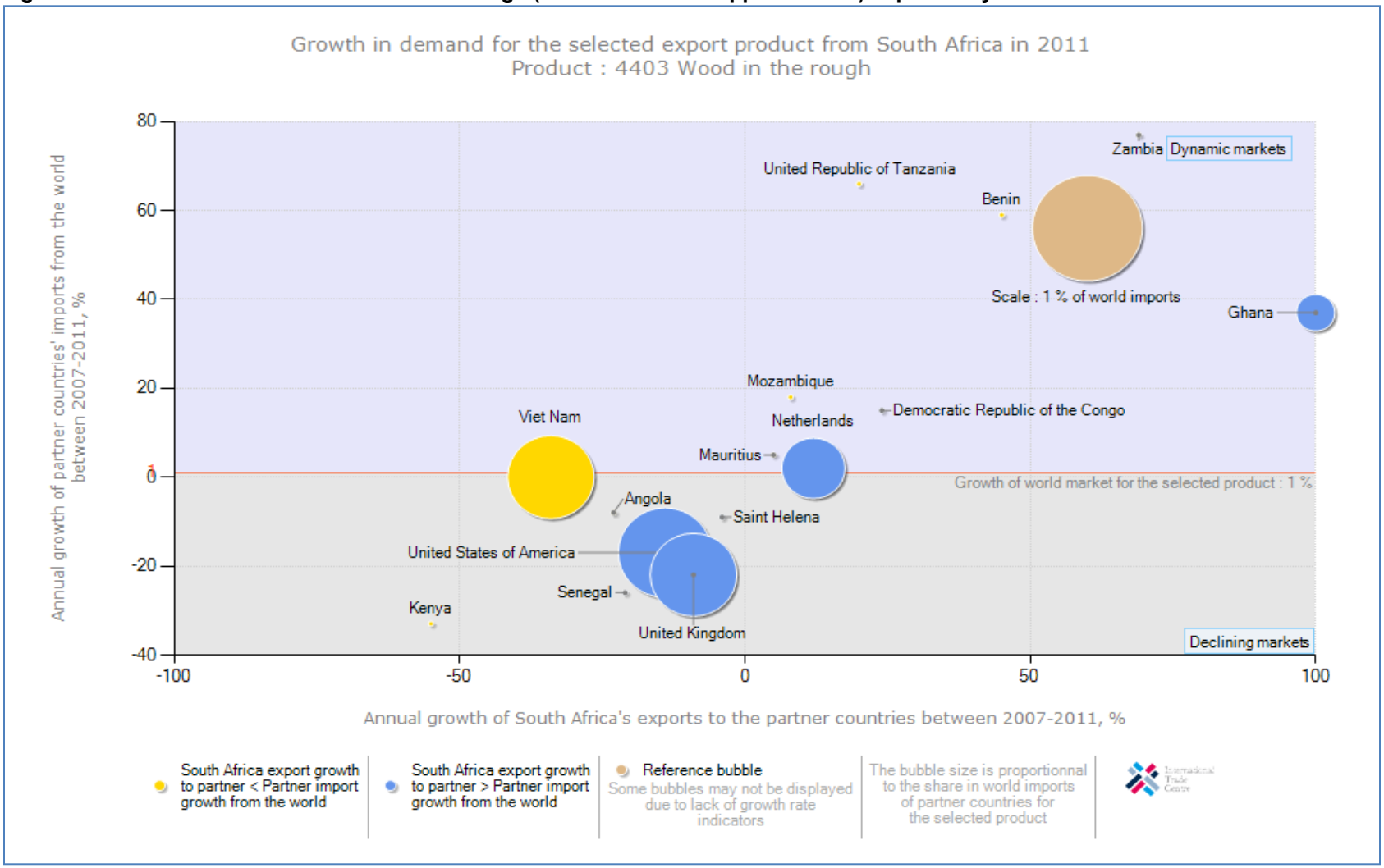
Importers	Trade Indicators							Tariff (estimated) faced by South Africa (%)
	Exported value 2011 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2011 (tons)	Unit value (USD/unit)	Exported growth in value between 2007-2011 (%, p.a.)	Exported growth in quantity between 2007-2011 (%, p.a.)	Exported growth in value between 2010-2011 (%, p.a.)	
World	20024	100	1447795	14	-3		80	
Mozambique	3324	16.6	597800	5.56	8		16	0
United Republic of Tanzania	2824	14.1	35745	79	20	90	290	0
Ghana	2320	11.6	9877	235	146	148	1935	0
Kenya	1778	8.9	204308	8.7	-55		29533	0
Sri Lanka	1098	5.5	2219	495			10	0
Mauritius	1085	5.4	5345	203	5		62	0
Netherlands	1052	5.3	3464	304	12	7	370	0
World	20024	100	1447795	14	-3		80	
Mozambique	3324	16.6	597800	5.56	8		16	0
Guinea	1004	5	19312	52				5
Viet Nam	928	4.6	5621	165	-34		42	0
Rwanda	517	2.6	1044	495			199	0
Chinese Taipei	334	1.7	675	495			1988	0
Zambia	311	1.6	36538	8.51	69		-82	0
United Kingdom	306	1.5	2258	136	-9		46	0
Jordan	303	1.5	1916	158				15.8

Source: Trade Map

Table 16 depicts the list of importing markets for wood in the rough (whether or not stripped of bark) exported from South Africa to the world in 2011. The table further depicts that Africa (Mozambique, United Republic of Tanzania and Ghana) was the main export import market for wood in the rough originating from South Africa during the period under consideration. The table further depicts that, South Africa exported a total of 1447795 tons to the world in 2011. The table also depicts that, most of South Africa's wood in the rough exports went to Mozambique (597800 tons), followed by United Republic of Tanzania at 35745 tons and Ghana at 9877 tons.

The table also depicts that Mozambique commanded the greatest share in South Africa's exports of wood in the rough at 16.6%, United Republic of Tanzania at 14.1% and Ghana at 11.6%.

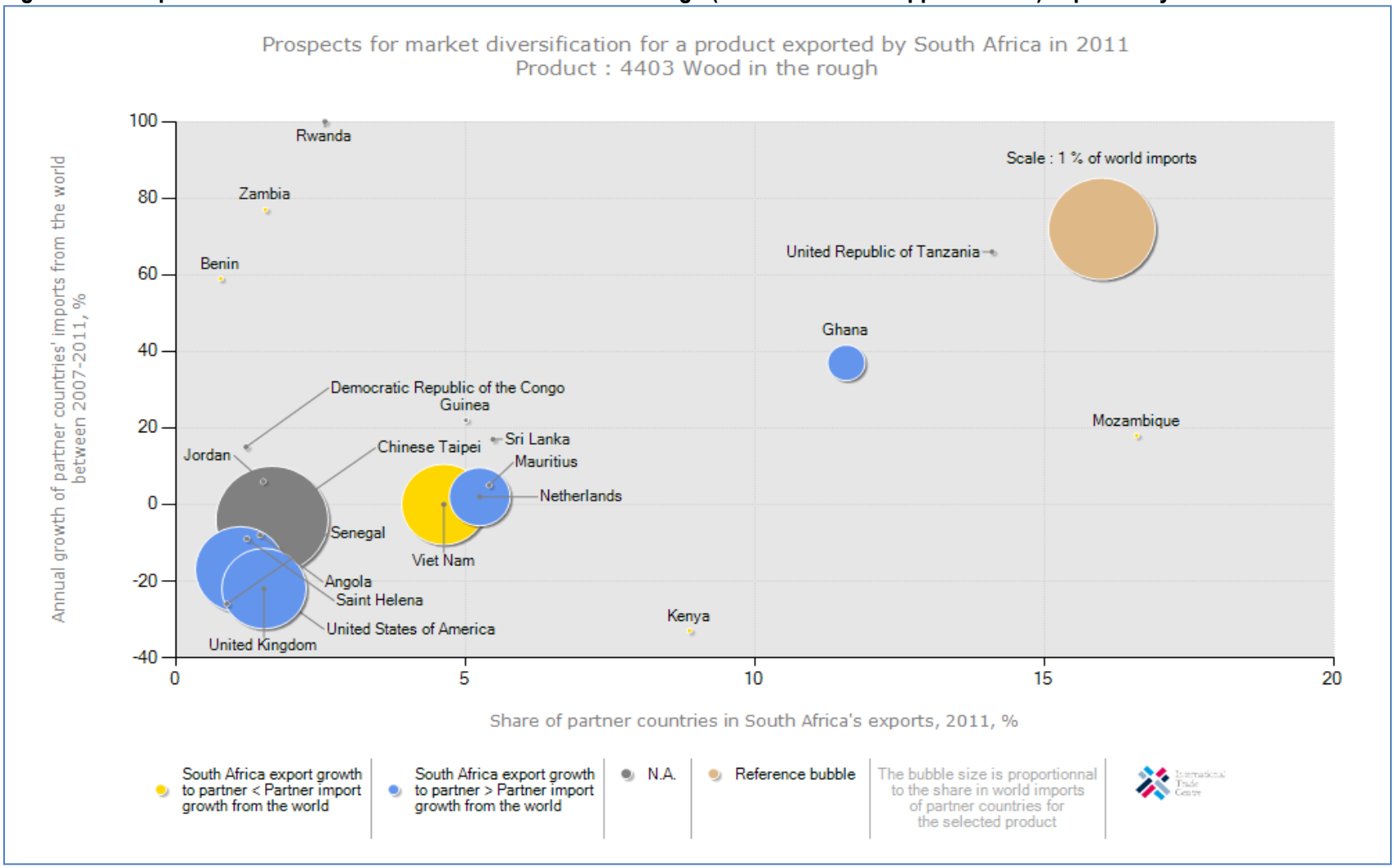
Figure 81: Growth in demand for wood in the rough (whether or not stripped of bark) exported by SA in 2011



Source: Trade Map

Figure 81 illustrates growth in demand for wood in the rough (whether or not stripped of bark) exported by South Africa to the world in 2011. The figure further illustrates that Viet Nam was the biggest market of wood in the rough exported by South Africa in 2011. The figure also illustrates that the demand for wood in the rough is growing at a faster pace of about 100% in Ghana, followed by Zambia at 70%, Democratic Republic of Congo at 25% and Netherlands at 10%, while annual growth of South Africa exports to declining markets such as United Kingdom and United States of America are declining at 10% respectively. The graph also illustrates that Ghana and Zambia are dynamic markets because both their annual growths of South Africa's exports and their annual growth of partner countries' imports from the world were between 40% and 100% between 2007 and 2011.

Figure 82: Prospects for market diversification for wood in the rough (whether or not stripped of bark) exported by SA in 2011



Source: Trade Map

Figure 82 shows prospects for market diversification for wood in the rough (whether or not stripped of bark) exported by South Africa to the world in 2011. The figure further shows that during the period under scrutiny, Viet Nam was the biggest market for wood in the rough (whether or not stripped of bark) exports from South Africa. The figure further shows that should South Africa want to diversify its markets of wood in the rough exports, small but attractive markets are available in Ghana, Netherlands, Zambia and United Republic of Tanzania.

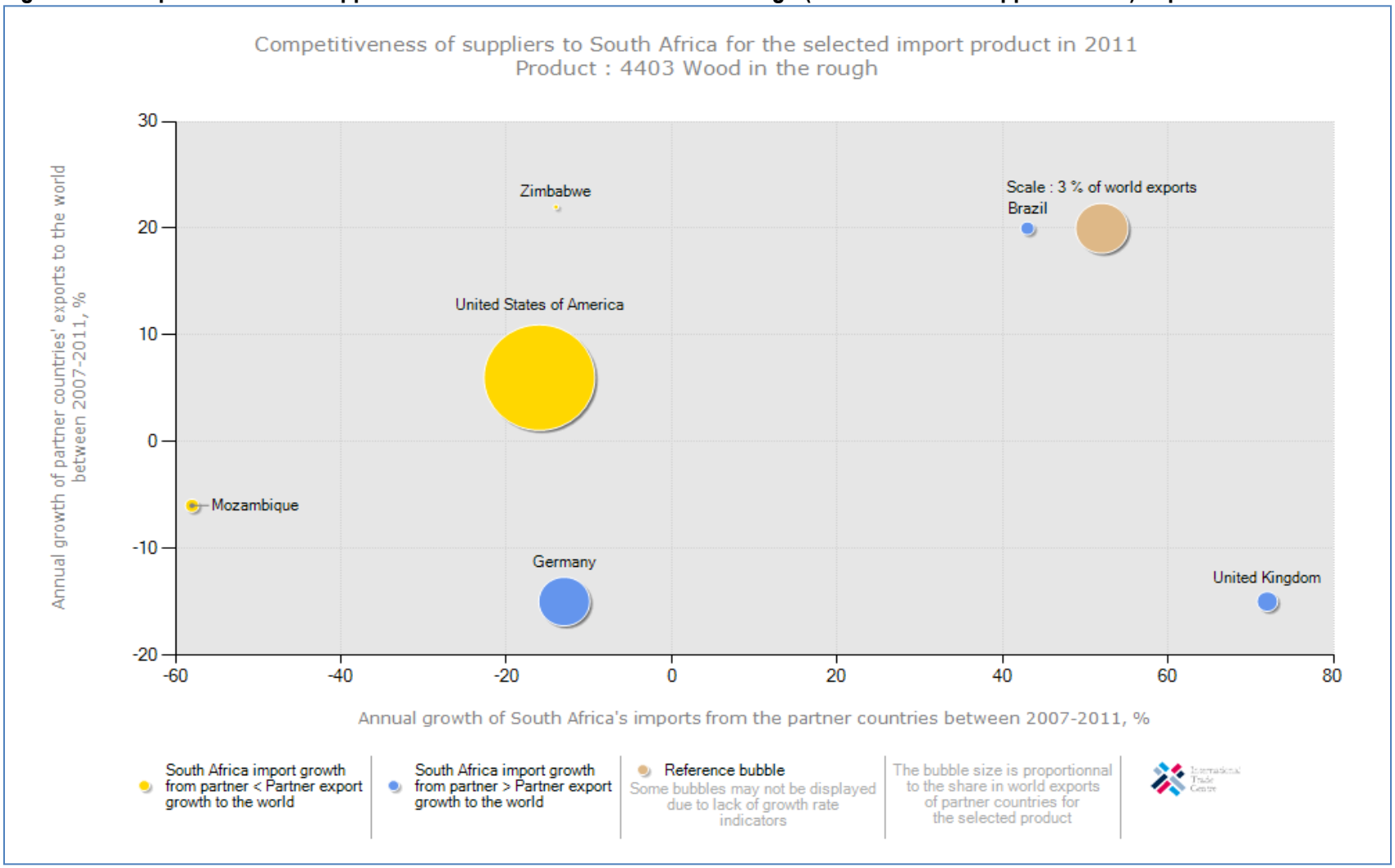
Table 17: List of supplying markets for wood in the rough (whether or not stripped of bark) imported by SA in 2011

Exporters	Trade Indicators							Tariff (estimated) applied by South Africa (%)
	Imported value 2011 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2011 (tons)	Unit value (USD/unit)	Imported growth in value between 2007-2011 (%, p.a.)	Imported growth in quantity between 2007-2011 (%, p.a.)	Imported growth in value between 2010-2011 (%, p.a.)	
World	508	100	1972	258	-49	-2	-68	
United States of America	190	37.4	619	307	-16	50	-39	0
Brazil	80	15.7	262	305	43	53	-38	0
Germany	66	13	407	162	-13			0
South Africa	65	12.8	245	265			71	
Zimbabwe	40	7.9	267	150	-14	82	-44	0
France	34	6.7	91	374			386	0
United Kingdom	21	4.1	55	382	72	74	950	0
Viet Nam	7	1.4	10	700				0
Mozambique	2	0.4	4	500	-58		-98	0

Source: Trade Map

Table 17 depicts the list of supplying markets for wood in the rough (whether or not stripped of bark) imported from the world by South Africa in 2011. The table further depicts that during the period under observation, United States of America, followed by Brazil and Germany were the main supplying markets for wood in the rough into South Africa. The table further depicts that, South Africa imported a total of 1972 tons from the world in 2011. The table also depicts that most of South Africa's wood in the rough imports were from United States of America at (619 tons), followed by Germany at (262 tons) and Brazil at (37203 tons).

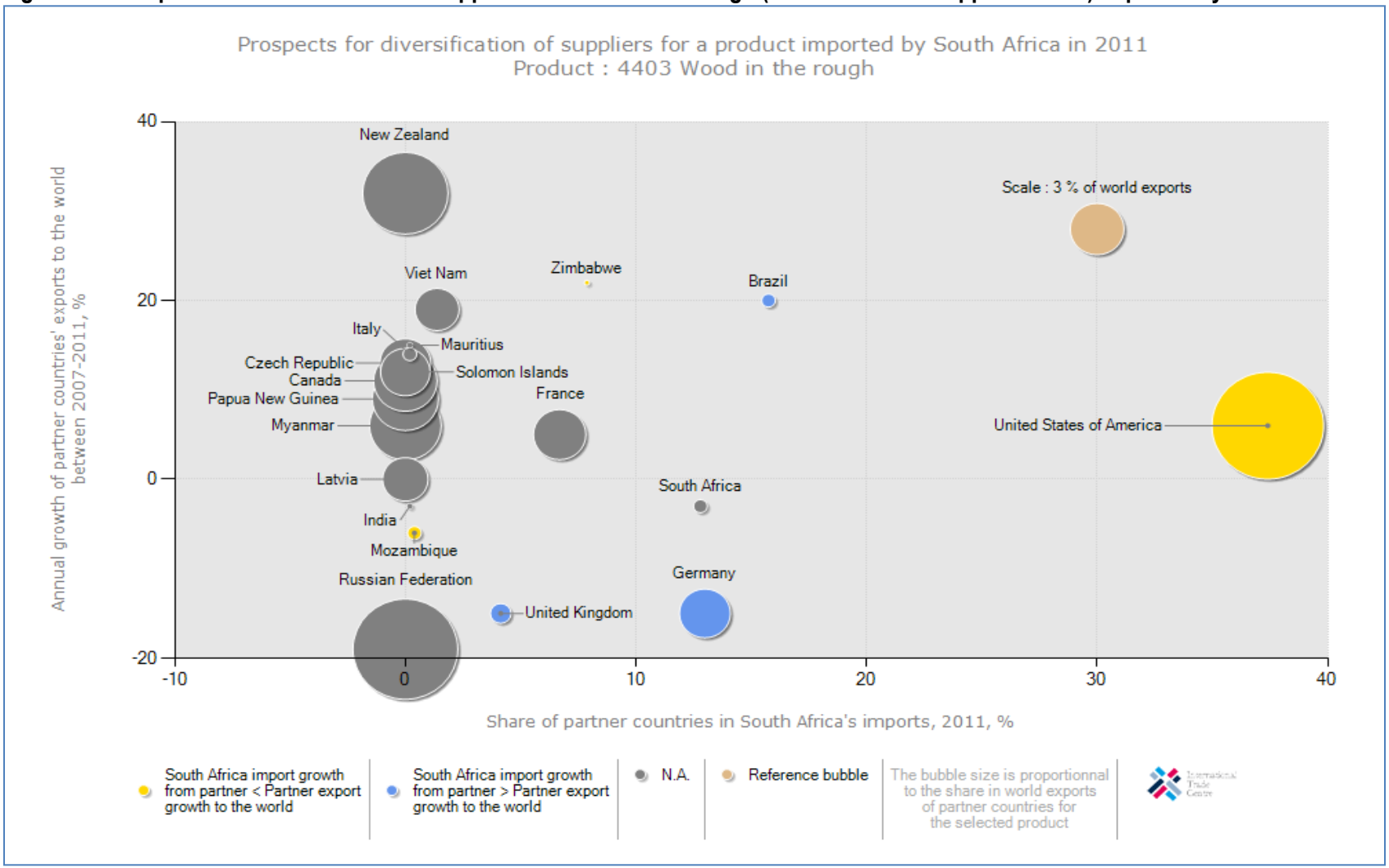
Figure 83: Competitiveness of suppliers to South Africa for wood in the rough (whether or not stripped of bark) imports in 2011



Source: Trade Map

Figure 83 depicts competitiveness of suppliers to South Africa for wood in the rough (whether or not stripped of bark) from the world into South Africa in 2011. The figure further shows that during the period under examination, United States of America was the biggest market for wood in the rough imports into South Africa. The figure also depicts that United Kingdom and Brazil were the most competitive markets for wood in the rough imports into South Africa between 2007 and 2011 period.

Figure 84: Prospects for diversification of suppliers for wood in the rough (whether or not stripped of bark) imported by SA in 2011



Source: Trade Map

Figure 84 indicates prospects for diversification of suppliers for wood in the rough (whether or not stripped of bark) imported by South Africa in 2011. The figure further indicates that during the period under review; United States of America was the biggest market for wood in the rough imports by South Africa. The figure also indicates that if South Africa had to diversify its suppliers of wood in the rough, small supplying markets exist in Brazil and United Kingdom, while the biggest markets exist in United States of America.

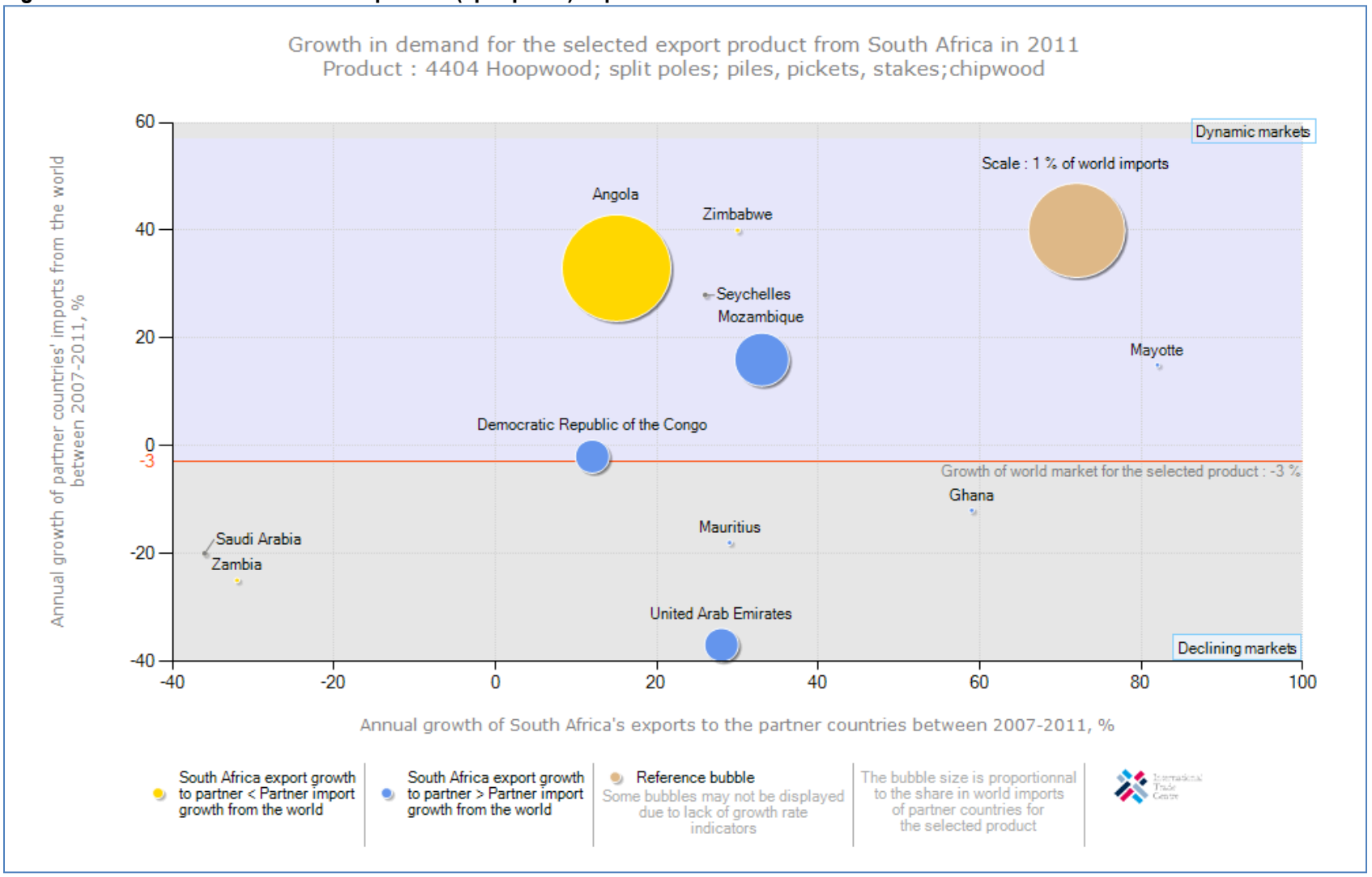
Table 18: List of importing markets for hoop wood (split poles) exported by SA in 2011

Importers	Trade Indicators							Tariff (estimated) faced by South Africa (%)
	Exported value 2011 (USD thousand)	Share in South Africa's exports (%)	Exported quantity 2011 (tons)	Unit value (USD/unit)	Exported growth in value between 2007-2011 (%, p.a.)	Exported growth in quantity between 2007-2011 (%, p.a.)	Exported growth in value between 2010-2011 (%, p.a.)	
World	48	100	21	2286	-19	-53	-16	
Chile	40	83.3	4	10000		21	-13	0
China	2	4.2	0				-50	0
Chinese Taipei	2	4.2	2	1000		23	0	0
Zimbabwe	2	4.2	15	133	-23	-13		0
United Kingdom	2	4.2	0		7			0

Source: Trade Map

Table 18 depicts the list of importing markets for hoop wood, split poles exported by South Africa in 2011. The table further depicts that Africa (Zimbabwe) was the main market for hoop wood, split poles originating from South Africa, followed by Chile. The table further depicts that South Africa exported a total of 21 tons to the world in 2011.

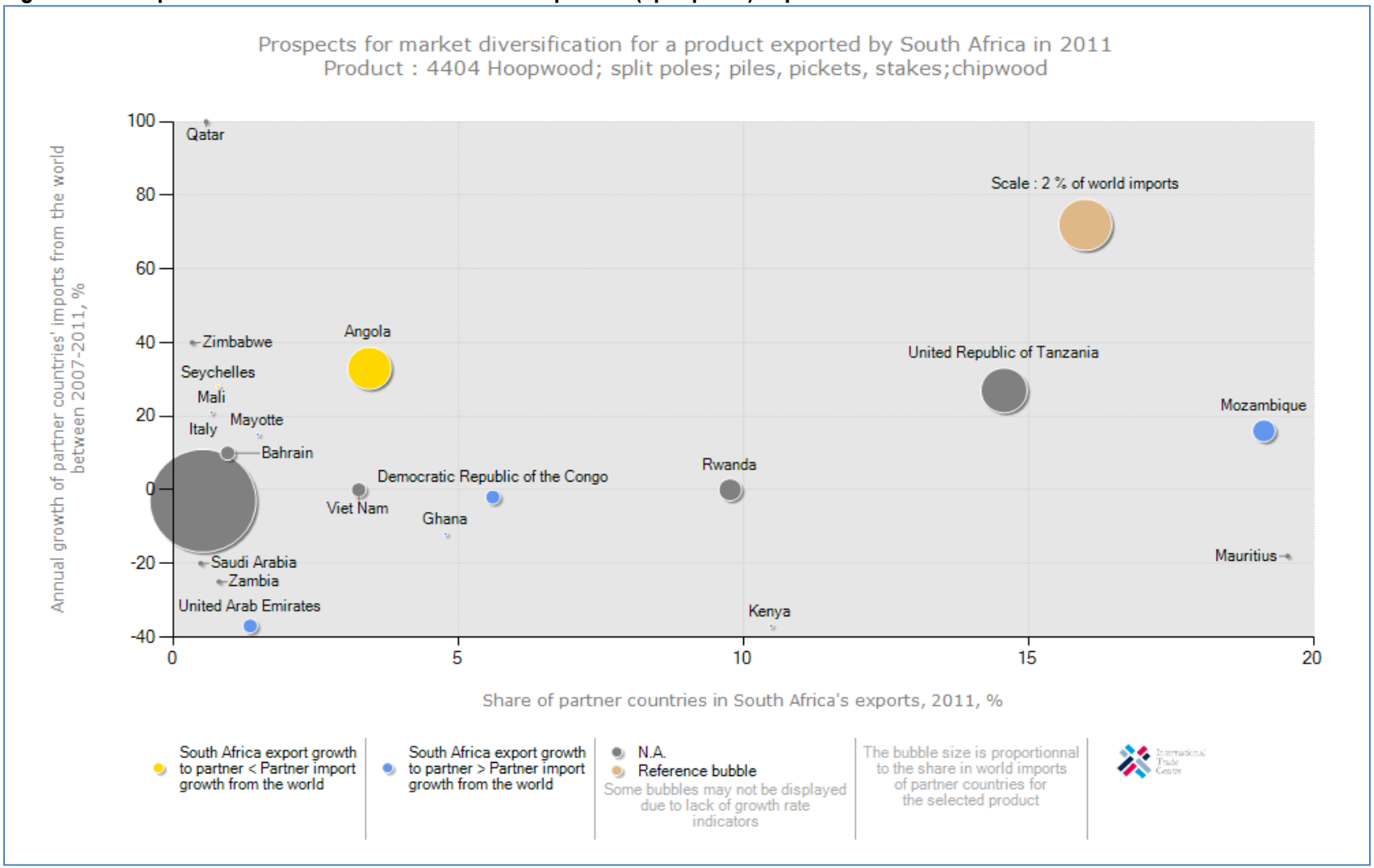
Figure 85: Growth in demand for hoop wood (split poles) exported from South Africa in 2011



Source: Trade Map

Figure 85 illustrates growth in demand for hoop wood, split poles exported from South Africa in 2011. The figure further illustrates that Angola was the biggest market for hoop wood exported by South Africa. The figure also illustrates that the demand for hoop wood is growing at a faster pace (52%) in Seychelles and United Arab Emirates at (30%), while annual growth of South Africa exports to declining markets such as Kenya and Mozambique are growing. The graph also illustrates that Seychelles is a dynamic market because both their annual growths of South Africa's exports and their annual growth of partner countries' imports from the world was between 50% respectively between 2007 and 2011 period.

Figure 86: Prospects for market diversification for hoop wood (split poles) exported from South Africa in 2011



Source: Trade Map

Figure 86 shows prospects for market diversification for hoop wood, split poles exported by South Africa in 2011. The figure further shows that in 20110, Angola was the biggest market for hoop wood exports from South Africa. The figure further shows that should South Africa want to diversify its markets of hoop wood exports, small but attractive markets are available in the Mozambique and Democratic republic of Congo.

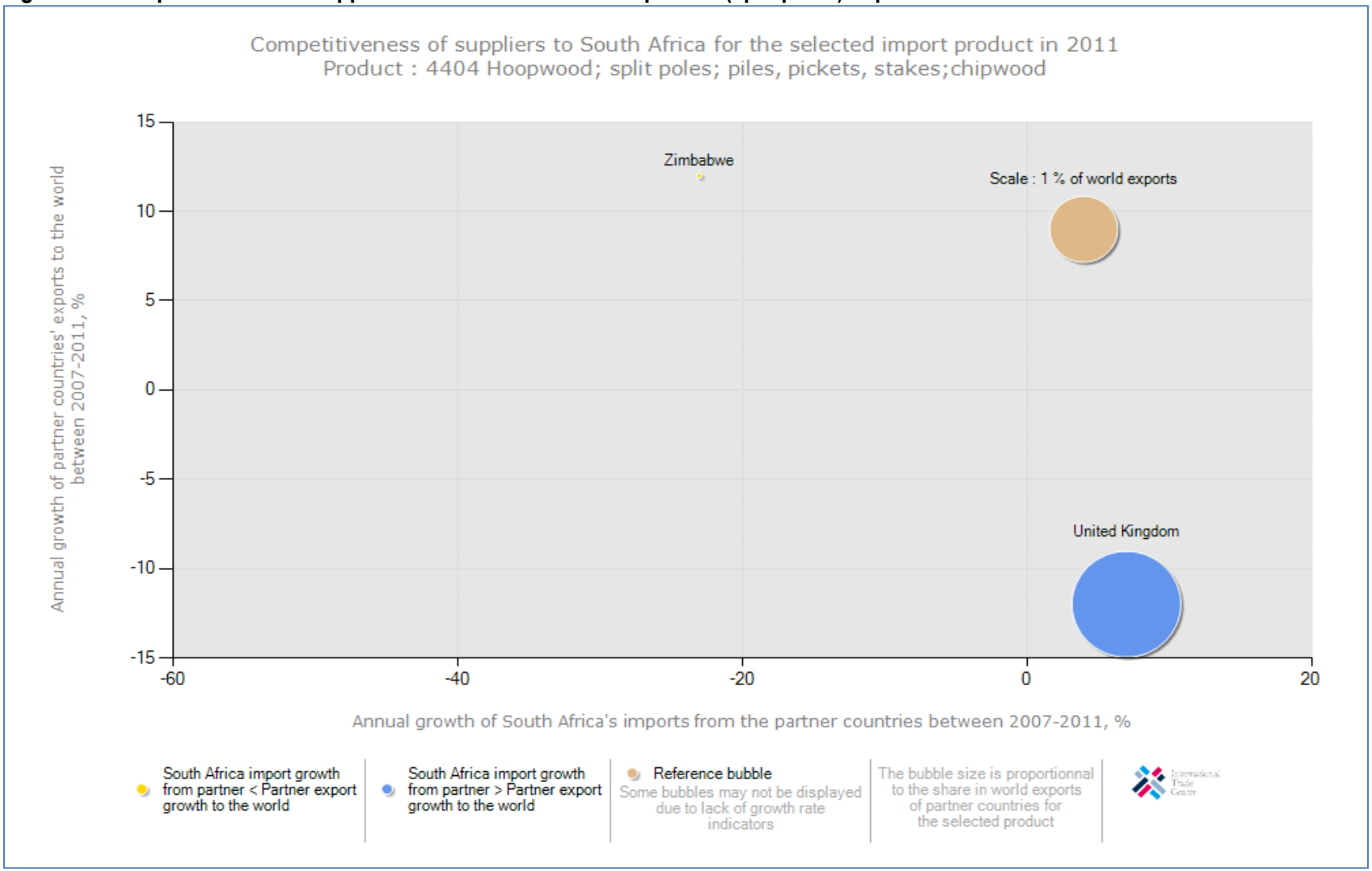
Table 19: List of supplying markets for hoopwood (split poles) imported by South Africa in 2011

Exporters	Trade Indicators							Tariff (estimated) applied by South Africa (%)
	Imported value 2011 (USD thousand)	Share in South Africa's imports (%)	Imported quantity 2011 (tons)	Unit value (USD/unit)	Imported growth in value between 2007-2011 (%, p.a.)	Imported growth in quantity between 2007-2011 (%, p.a.)	Imported growth in value between 2010-2011 (%, p.a.)	
World	48	100	21	2286	-19	-53	-16	
Chile	40	83.3	4	10000		21	-13	0
China	2	4.2	0				-50	0
Chinese Taipei	2	4.2	2	1000		23	0	0
Zimbabwe	2	4.2	15	133	-23	-13		0
United Kingdom	2	4.2	0		7			0

Source: Trade Map

Table 19 depicts the list of supplying markets for hoop wood, split poles imported by South Africa in 2011. The table further depicts that Chile was the main supplying market for hoop wood imports into South Africa during the period under scrutiny. The table further depicts that South Africa imported a total of 21 tons from the world in 2011. The table also depicts that most of South Africa's hoop wood, split poles imports were from Zimbabwe at (15 tons), followed by Chile at (4 tons) and Chinese Taipei at (2 tons).

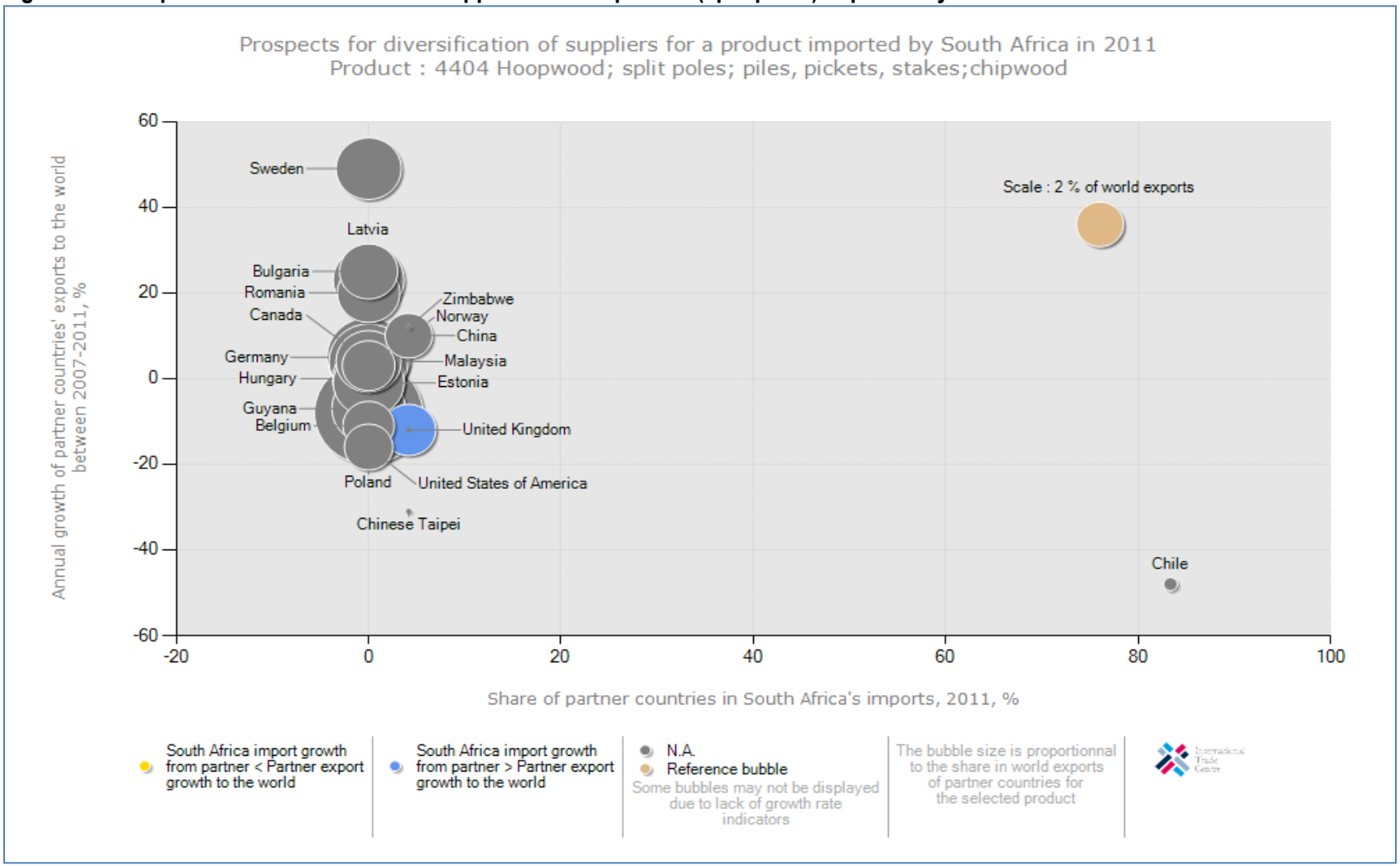
Figure 87: Competitiveness of suppliers to South Africa for hoop wood (split poles) imports in 2011



Source: Trade Map

Figure 87 shows competitiveness of suppliers to South Africa for hoop wood, split poles imports into South Africa in 2011. The figure further shows that during the period under examination, Poland was the biggest market for wood charcoal. The figure also shows that China was the most competitive supplying market for hoop wood imports by South Africa between 2007 and 2011 period.

Figure 88: Prospects for diversification of suppliers for hoop wood (split poles) imported by South Africa in 2011



Source: Trade Map

Figure 88 indicates prospects for diversification of suppliers for hoop wood, split poles imported by South Africa in 2011. The figure further indicates that during the period under review; United States of America was the biggest market for hoop wood, split poles imports into South Africa. The figure also indicates that if South Africa had to diversify its suppliers of hoop wood, split poles, small supplying markets exist in Chile, Indonesia and Romania while the biggest markets exist in China, Canada and France.

7. GOVERNMENT INTERVENTIONS

Komati Land Forests (KLF) owns and manages the prime softwood saw log forestry assets in the Mpumalanga, Limpopo and KwaZulu-Natal provinces of South Africa. KLF came about through the restructuring of the commercial forestry assets of the Department of Water Affairs and Forestry (DWAF) and South African Forestry Company Ltd (SAFCOL). The company boasts a long and profitable history with its plantations already in rotation. An integral part of the South African Forestry Industry since the early 1900s, Komati Land Forests commenced operations as an independent business unit in November 2001. The principal objective of the company is the long term and sustainable development of its assets in line with acceptable management practices and conservation principles.

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